DonorQuest User's Guide

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Topic

I

1 Introduction To DonorQuest



DonorQuest is designed to meet the donation tracking and fundraising needs of nonprofit organizations. Besides acting as a complete donor and prospect mail list program, DonorQuest is able to maintain all the information you need about current and potential contributors. DonorQuest comes with many useful reports and a selection facility that allows you to perform a selection (query) as broad or as specific as you need. Together these two essential features allow you to perform a selection about the specific gifts and giving patterns of your contributors and respond to these gifts and giving patterns with specialized thank-you letters and tightly targeted campaign mailings. There is also a comprehensive donor contact management facility with date-based reminders.

Beyond these critical features, DonorQuest is also capable of running on a multi-user in-house network, or it may be completely cloud-based. This will allow multiple users to perform data entry and reporting operations simultaneously. You could have many users entering donations, running reports, etc., all at the same time. Whether you are running DonorQuest strictly in-house with your own file server, or using our cloud service, the interface and features are the same. So this user's guide applies to both, and anything you learn in one will be the same if your organization starts with the in-house version, and eventually transitions to the cloud service (or vice-versa). DonorQuest may even be run as a traditional desktop application on a single computer, requiring neither an in-house network and file server, nor an Internet connection. Again, all these product variations are offered with the same user interface, so anything you learn in one directly applies to the others.

Whether or not you're running on a network or in the cloud, DonorQuest offers optional password security. If you choose to use this feature, then one or more people in your organization will be responsible for maintaining user accounts for DonorQuest. When a user starts DonorQuest, he or she will be asked to enter their user name and password. If DonorQuest does not know the person trying to access the database, he/she will not be allowed in. Once in DonorQuest, each user will be limited in the level of access they will have to sensitive data, depending on how their user account was set up.

1.1 Starting DonorQuest

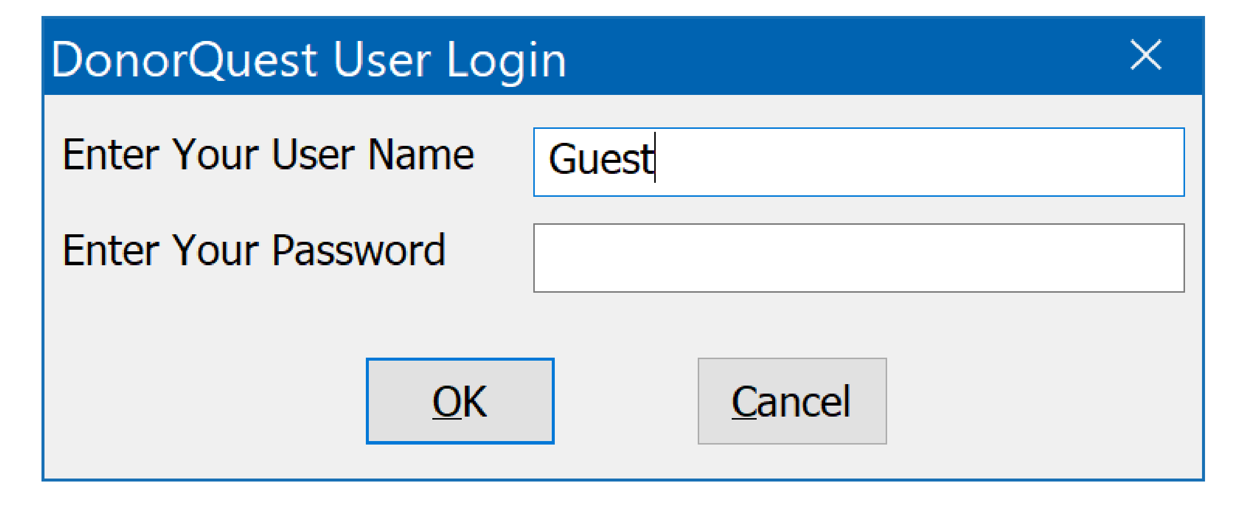
There are two ways to start the standard in-house version of DonorQuest. One is by double-clicking the DonorQuest icon you should find on your desktop which looks like this:



The other way is to click on the Windows Start button, then select Programs. From there, click on DonorQuest.

Note: If you are using the cloud-based version of DonorQuest, then you will instead have a Parallels icon on your desktop. You must first double-click on the Parallels icon, then double-click the DonorQuest icon which you will see inside the Parallels Client window. After that, all interaction will be the same for all versions of DonorQuest.

Once DonorQuest starts, you will be asked to enter your user name (see below). If you have just installed DonorQuest, and have not yet set up user accounts, then you should type Guest for the user name (no password is required).



Note that if you are using DonorQuest in a multi-user environment, you should speak with your administrator about setting up a DonorQuest user account for yourself, as the Guest account is just for temporary use. If you are both the administrator and main DonorQuest user, you should still create a user account for yourself so that the actions you perform (adding new addresses, donations, etc) will all be tagged with your name and a transaction date for reference purposes. As new people in your organization begin to use DonorQuest, their actions will likewise be tracked under their own unique user names. This is for more than simple accountability -- it allows reports to be run for information a specific user has entered for a given time period, or any other condition.

The chapters, Initial Setup, Program Settings, and System Maintenance are intended for

the person who will administer DonorQuest. That is, the person who is responsible for setting up DonorQuest and maintaining it. This includes creating new user accounts with varying levels of access for the other people who will need to use DonorQuest. If you will only be using DonorQuest and are not responsible for administering its usage, you may skip over these chapters. If you are new to DonorQuest, the two most important chapters for you to read are the Quick Start Guide and Entering Information chapters. If your activities will be limited to data entry, then these two chapters are really all you need to read.

Topic II

2 DonorQuest.com

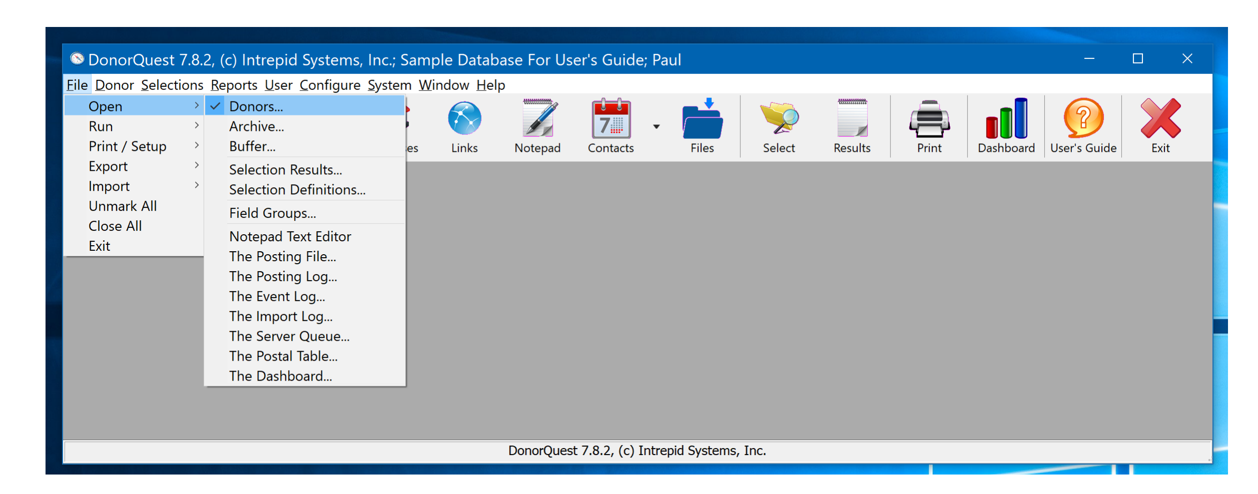
We're here for you. Whether you just have a quick question or need personalized in-depth training, we have options to meet your needs. Be sure and visit us at www.DonorQuest.com



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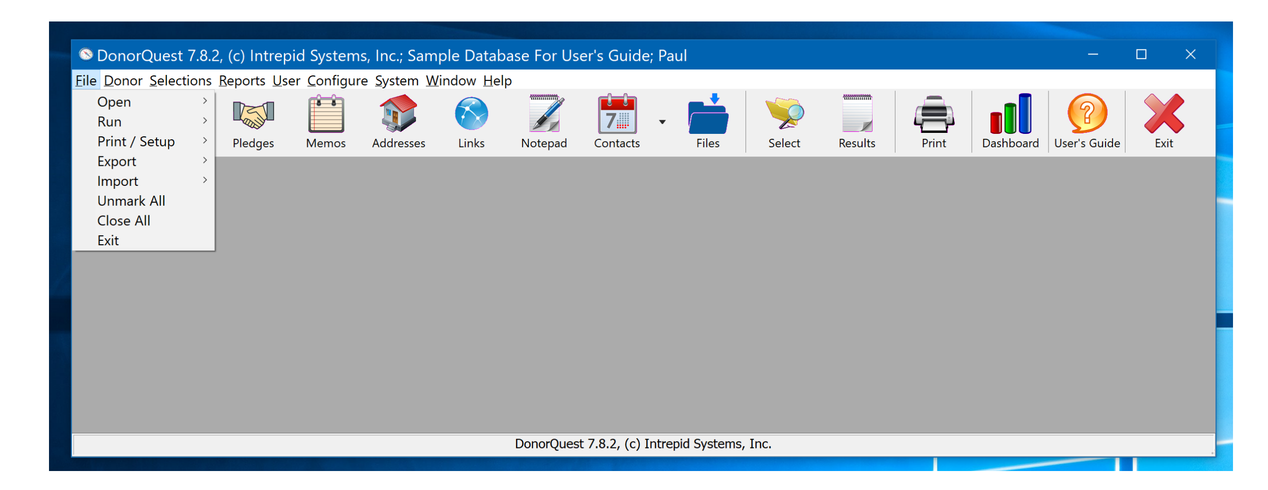
Topic III

3 The DonorQuest Menu



The main DonorQuest program menu provides access to every feature of the software. This topic explores every option of the DonorQuest menu, and either explains the option, or provides a link to where it is covered in this User's Guide. The top-level menu names of File, Donor, Selections, Reports, User, Configure, System, Window, and Help are broken down into separate subtopics.

3.1 File Menu



The File Menu generally deals with DonorQuest actions involving external files, though it also facilitates access to some key DonorQuest features:

File, Open, Donors

Opens the main donor dataset used for adding new donors, donations, etc.

File, Open, Archive

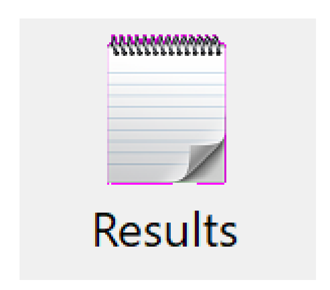
Opens the archive dataset used to store donor records that you wish to retain, but do not want in your active, Donor dataset. Generally, you should not move any donor records out of the Donor dataset that have any donation or pledge history, because doing so will cause that data to drop out of reports which reference historical data. For example if a donor is removed from the Donor dataset, their individual donation information will not show up on a campaign summary report which covers all campaigns for all time.

File, Open, Buffer

Opens the main buffer dataset used for temporary copies of donor accounts or as an intermediate step in the donor data import process. While working in the Buffer dataset, you are free to make changes to the records without affecting the master copy of a donor record housed in the Donor dataset. The Buffer dataset can be routinely purged, so never place any information in it which you wish to keep.

File, Open, Selection Results

Opens a window showing all past Selection Results. This is the same as clicking on the Results icon of the DonorQuest tool bar, as shown here:



File, Open, Selection Definitions

Opens a window allowing the viewing and copying of any pre-defined selection, as well as the creation of custom user-defined selection filters.

File, Open, Field Groups

Provides direct access to viewing existing field groups and creating new custom ones. Field groups are used in data exports. They define the columns which are exported to various file formats, and they are used for direct exports to Excel.

File, Open, Notepad Text Editor

Opens the standard Windows NotePad program which can be used to edit pure text files, such as the RText*.txt series of files which are used to customize some of the DonorQuest donation receipt statements.

File, Open, The Posting File

Displays the contents of the posting file. The posting file is mainly used in conjunction with the Deferred Posting mode of donation entry in DonorQuest, which allows organizations with large volumes of daily donations to have centralized oversight of the actual posting of donations to their respective donor accounts. In deferred posting mode, newly added donations are held in the posting file until the accuracy of their entry is confirmed via the bank deposit report of the General Ledger Process, then all donations in the posting file are posted to the respective donor accounts by running the File, Run, Donation Posting process.

File, Open, The Posting Log

The posting log contains a detailed account of each donation posting session, used to post donations to their respective donor accounts when DonorQuest is run in Deferred Posting mode.

File, Open, The Event Log

Opens the DonorQuest Event Log, which shows all of the events generated by all user interaction with DonorQuest. Everything each user does is tracked moment by moment in great detail in this log, and it can be very useful in discovering what may have been done in the routine daily use of DonorQuest months or even years ago. For example, if you accidentally delete a donor account and need the ID of the donor to restore it via the Donor, Restore A Deleted Donor feature, you will find the deletion event and the donor's ID here.

File, Open, The Import Log

The import log contains a detailed account of all the decisions DonorQuest made during past data imports using the File, Import, Donor Data feature. For example it will track which donor accounts were added as new from your import file, and which were found to already exist and updated.

File, Open, The Server Queue

When running DonorQuest in client/server mode on a local area network (LAN), Selections (queries) and other data-intensive operations are processed on your actual file server. Selection requests are queued on the server, and processed in the order they are received. Normally the Server Queue window is automatically opened when you begin a selection, so that you may see the progress as the selection is processed. But if you are not running a selection, and you just want to see if any are queued for processing by other users, you can click on File, Open, The Server Queue. This feature does not apply to the cloud version of DonorQuest, as all operations are always processed on the DonorQuest server farm with lightning speed.

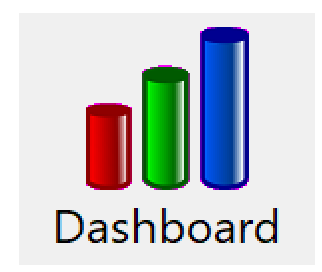
File, Open, The Postal Table

DonorQuest speeds data entry by auto-filling the city, state, and county for you when you enter the zip code for a new donor and press the tab key. DonorQuest uses an internal zip

code table (provided by the USPS) to accomplish this. On the rare occasion a city, state, zip, and county combination is not known to DonorQuest, you can optionally add the new combination so that DonorQuest will recognize it for future entries. You may click on File, Open, The Postal Table to gain full access to DonorQuest's internal zip code table. You may correct or delete entries you allowed to be added, and all of your custom city, state, zip, county combinations will also be preserved even as the predefined combinations are updated during periodic DonorQuest upgrades.

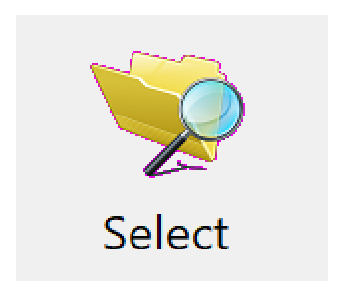
File, Open, The Dashboard

Opens the DonorQuest Dashboard, which offers a live view of what's going on in your donor database from minute to minute. All of the displays within the dashboard are updated in realtime, so you may simply leave it open to continuously monitor the information which most interests you. The dashboard can be kept open along with other DonorQuest windows, allowing you to do your normal activities in DonorQuest while still monitoring events. It can also be resized to suit your preferences and to fit nicely with whatever else you may have open in DonorQuest. This menu option is the same as clicking on the Dashboard icon of the DonorQuest tool bar, as shown here:



File, Run, A Selection

Opens the Selection creation window and allows you to run a new Selection. This is the same as clicking on the Select icon of the DonorQuest tool bar, as shown here:



File, Run, Donation Posting

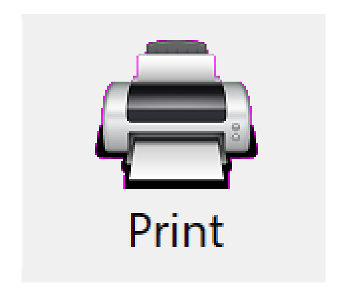
When running DonorQuest in Deferred Posting mode, this batch process will post all of the donations in the posting file to the respective donor accounts to which they belong.

File, Run, General Ledger Process

Launches the General Ledger Process which prints an optional deposit report for donation batches, and also generates the Word mail merge files used for thank-you letters.

File, Print / Setup, A Report

Opens the main report menu in DonorQuest. This is the same as clicking on the Select icon of the DonorQuest tool bar, as shown here:



File, Print/Setup, Mailing Labels

Allows you to print existing and setup new Mailing Labels. If the Selection Results window is opened when you choose this option, it will be the same as clicking on the Print Labels button of the Selection Results Window.

File, Print / Setup, A Code Table

Allows you to setup new and edit existing codes for the various coded fields in DonorQuest. This is also the same as choosing Configure, Edit / Print A Code Table.

File, Export, Donor Data

Provides convenient context-sensitive access to the DonorQuest export facility for donor data. The donor data may be simply the current record showing in the Main Information window, a group of records you have marked in the Main Information window, or if you have the Selection Results window open, this option will commence an export for all of the records of the selection result you have highlighted.

File, Export, Report Layouts

Allows you to export one or more DonorQuest Report Layouts (including any custom ones you have created) to a file which can be shared with users of DonorQuest at other organizations, or with DonorQuest support if you are working on a challenging custom report and need a little help with it.

File, Export, Label Layouts

Allows you to export and share one or more DonorQuest Label Layouts with other DonorQuest users outside of your organization, or with other DonorQuest installations you manage.

File, Export, Selection Definitions

Allows you to export and share one or more DonorQuest Selection Definitions with other DonorQuest users outside of your organization, or with other DonorQuest installations you manage.

File, Export, Field Groups

Allows you to export and share one or more DonorQuest Field Groups with other DonorQuest users outside of your organization, or with other DonorQuest installations you manage.

File, Export, Import Mappings

Allows you to export and share one or more DonorQuest Import Mappings with other DonorQuest users outside of your organization, or with other DonorQuest installations you manage. Import Mappings are used with the donor data import process to tell DonorQuest what goes where. It's a mapping between the columns in a file containing donor data you are importing, and the internal fields of DonorQuest.

File, Export, All Donor Data

Allows you to export all of your donor information in one step, to a folder of your choice. You DonorQuest user account must have the export right enabled for you to be able to use this option. All of the internal DonorQuest data tables will be saved as .csv files in the folder you specify, and any donor-specific stored files will be saved in their original format in donor-specific subfolders within the export folder you specify. This option provides an easy way to create a local backup copy of all your donor information when using the online version of DonorQuest, but is also available with the in-house version for making quick and complete backups to USB drives and memory sticks.

File, Import, Donor Data

Allows you to add or update donor information from external sources, such as Excel spreadsheets or online donation processing services, rather than having to enter the information manually. It can also be used for completing a National Change of Address update. Please refer to the chapter on Importing, and the subsection of Donor Data for more information.

File, Import, Report Layouts

Allows you to import one or more DonorQuest Report Layouts from special DonorQuest format files created by other DonorQuest users. DonorQuest support staff may also email you custom reports to accommodate any special reporting needs you may have, and you will use this option to bring the new reports into DonorQuest. They will become part of the User-Defined Report Layouts menu.

File, Import, Label Layouts

Allows you to import one or more DonorQuest Label Layouts from special DonorQuest format files created by other DonorQuest users or DonorQuest support staff.

File, Import, Selection Definitions

Allows you to import one or more DonorQuest Label Layouts from special DonorQuest format files created by other DonorQuest users or DonorQuest support staff.

File, Import, Field Groups

Allows you to import one or more DonorQuest Field Groups from special DonorQuest format files created by other DonorQuest users or DonorQuest support staff.

File, Import, Import Mappings

Allows you to bring into DonorQuest one or more Import Mappings. Import Mappings are used with the donor data import process to tell DonorQuest what goes where. It's a mapping between columns in a file containing donor data you are importing, and the internal fields of DonorQuest. If DonorQuest support staff are helping you import donor data, they may also provide you with a custom import mapping so that DonorQuest will know exactly how to work with the data file you are importing donor data from.

File, Import, Codes

Opens the Setting Up Coded Fields window, which allows you to import codes and code descriptions from an external file for any of the coded fields in DonorQuest.

File, Import, Custom Dialogs

When creating custom dialogs which are stored in a DonorQuest .dlg file, your custom dialog may be made available for use by copying it from your local storage to where it can used with the DonorQuest system. Normally custom dialogs are created and edited on your workstation, then uploaded to DonorQuest using this option. You may also use this option to add external files referenced in custom DonorQuest reports, which may contain custom text and graphics, such as your organization's logo for use on donation receipts.

File, Unmark All

This option simply unmarks any records you may have marked in the currently open window. For example, if you have marked five hand-picked records for exporting or printing in the Main Information window, you may use this option to quickly remove the marks following the export or print job.

File, Close All

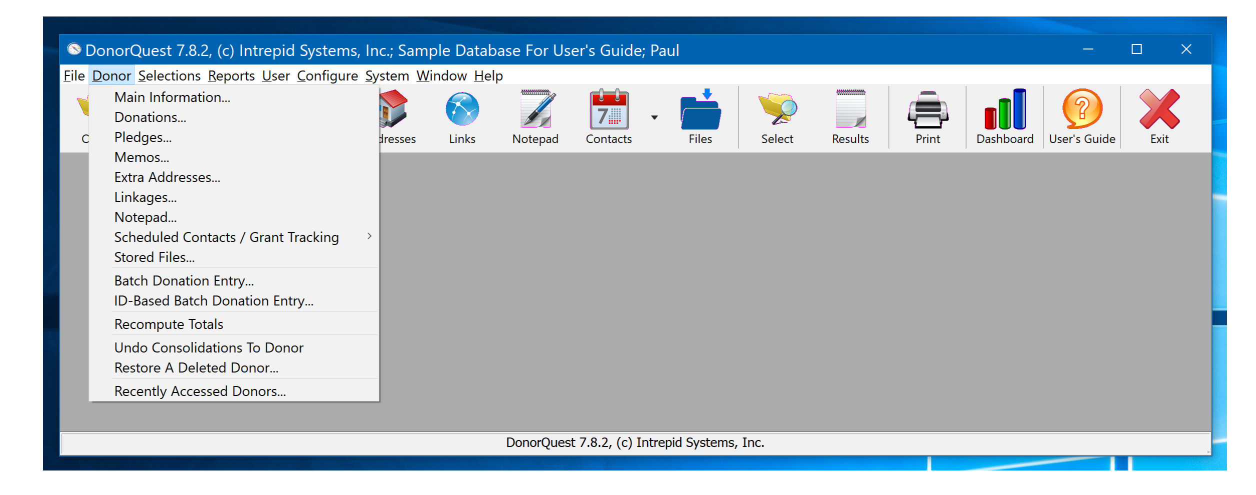
Closes any open windows and the associated data tables.

File, Exit

Closes all open windows in DonorQuest, then exits the program. Same as the main exit icon:



3.2 Donor Menu

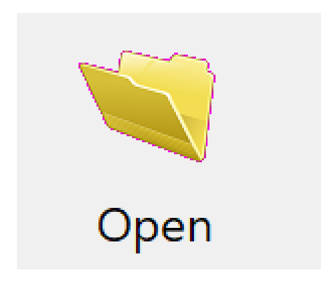


The Donor Menu mainly focuses on opening the windows you need to do data entry -

adding new donors, donations, pledges, etc.

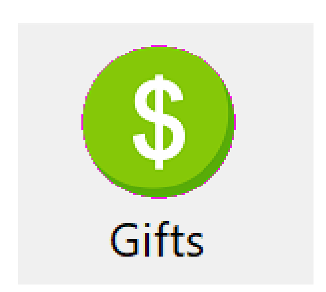
Donor, Main Information

Opens the main donor dataset used for adding new donors, donations, etc. This is the same as clicking on the Results icon of the DonorQuest tool bar:



Donor, Donations

Opens the Donations window. This is the same as clicking on the Gifts icon of the DonorQuest tool bar:



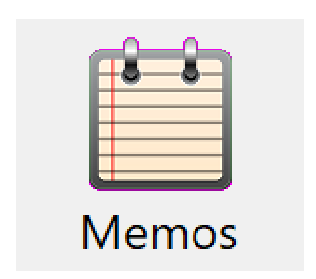
Donor, Pledges

Opens the Pledges window. This is the same as clicking on the Pledges icon of the DonorQuest tool bar:



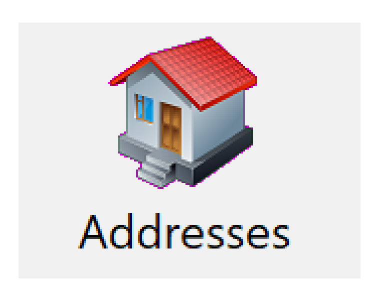
Donor, Memos

Opens the Memos window. This is the same as clicking on the Memos icon of the DonorQuest tool bar:



Donor, Extra Addresses

Opens the Extra Addresses window. This is the same as clicking on the Extra Addresses icon of the DonorQuest tool bar:



Donor, Linkages

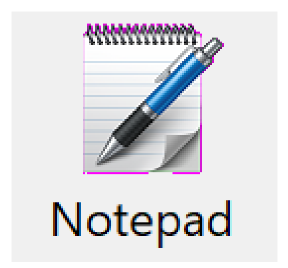
Opens the Linkages Window. This is the same as clicking on the Linkages icon of the DonorQuest tool bar:



Donor, NotePad

Opens the NotePad window. This is the same as clicking on the NotePad icon of the

DonorQuest tool bar:



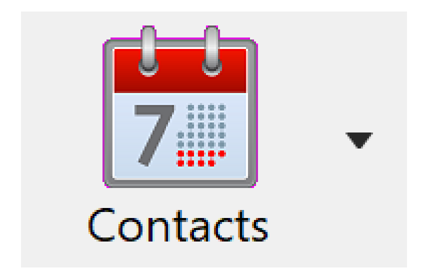
Donor, Scheduled Contacts / Grant Tracking...

This menu opens into a submenu of options specific to the Scheduled Contacts and Grant Management capabilities of DonorQuest. The contact manager in DonorQuest is designed for maintaining personal contact with your top donors as part of an ongoing Moves Management program. Future interactions may be scheduled between yourself and specific donors, and DonorQuest will remind you when it is time to contact each donor. The contact manager also acts as a repository of all the notes you make about each interaction you have with a donor.

The All For You submenu option will show you all of the contact records in DonorQuest linked to your user account. This allows you to review both past contacts which may have been closed, and upcoming contacts for you.

The Still Open For You submenu option will show you all contacts, past and present, which have not yet been resolved. That is, those requiring additional followup with the donor.

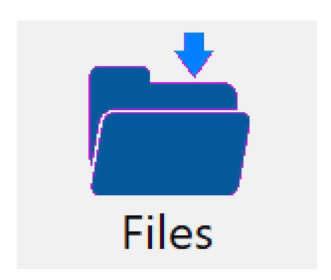
The For Donor submenu option will simply show you all of the contacts for the current donor, and it is the same as clicking on the Contacts icon of the DonorQuest tool bar:



The For Everyone submenu option will show you all contacts, past and present, for all users.

Donor, Stored Files

Opens the Stored Files window. This is the same as clicking on the Stored Files icon of the DonorQuest tool bar:



Donor, Batch Donation Entry

Batch Donation Entry in DonorQuest facilitates rapid donation entry using a simplified single dialog which can be fully controlled from the keyboard. While it has buttons, it can be operated without any mouse input. This menu option begins the standard batch entry mode in which you lookup existing donors by multiple fields (name, address, etc), and it also allows you to add new donors.

Donor, ID-Based Batch Donation Entry

This form of donation batch entry in DonorQuest is designed for still faster donation entry for the special case of entering donations only from donors or prospect who are already in DonorQuest, and who were sent a solicitation with a return card including the unique DonorQuest ID assigned to each donor and prospect record.

Donor, Recompute Totals

Refreshes yearly totals and donation counts for the currently displayed donor. Similar to the System, Recompute Totals option, but only acts on the current donor.

Donor, Undo Consolidations To Donor

If you accidentally consolidate two or more donors down to one, thinking they are duplicates, it is possible to reverse that action. Simply highlight the surviving donor record in the Main Information window and click on Donor, Undo Consolidations To Donor. You will see a list of all donor accounts previously consolidated to the current donor (and then deleted), and from there you may chose which consolidations you wish to reverse. When you reverse a consolidation, the donor accounts deleted through the consolidation will be restored, along with all donations, pledges, etc.

Donor, Restore A Deleted Donor

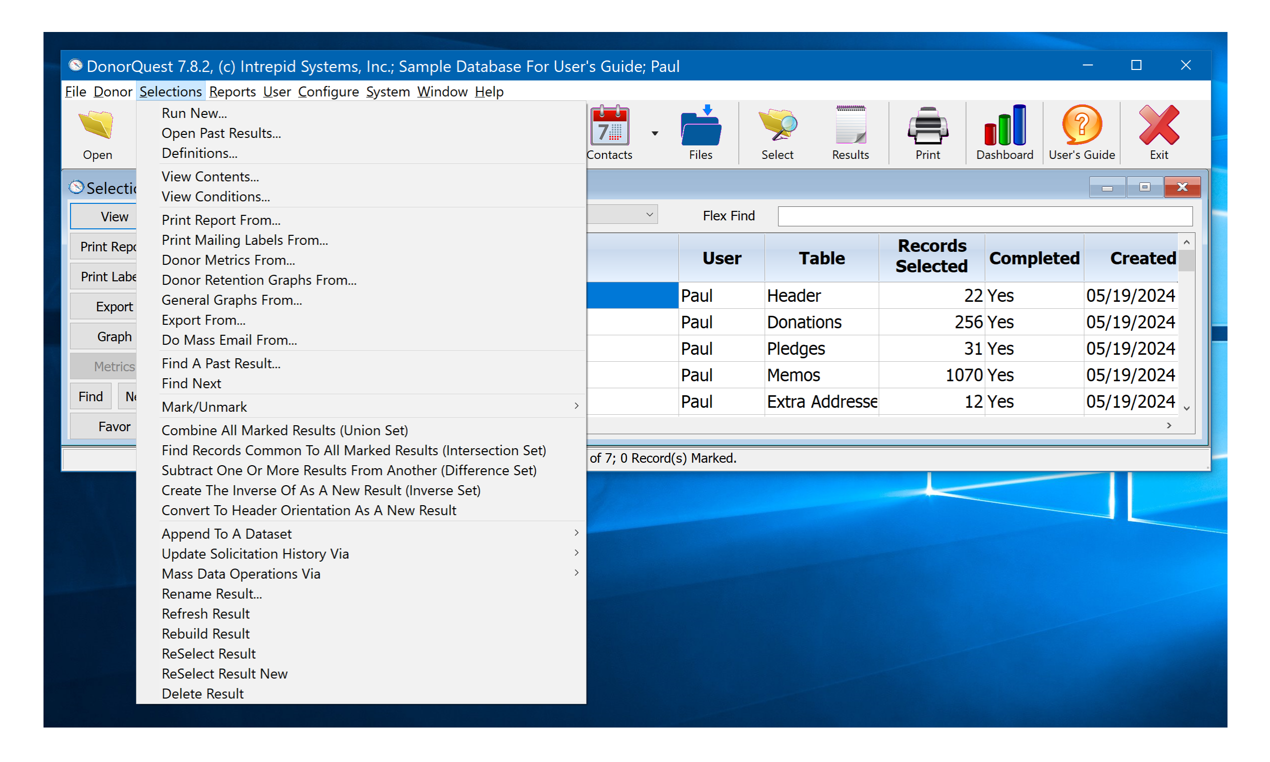
Accidents happen - when you're in a hurry it's possible you may accidentally delete the wrong donor, even with the warning message DonorQuest displays. If that happens don't panic, the donor record can be restored. You will need the ID number of the deleted donor, so if you don't have that handy from a report or other source, you can click on File, Open,

The Event Log. The deletion event will be logged there, along with your DonorQuest user name, the name of the deleted donor, as well as the deleted donor's ID number.

Donor, Recently Accessed Donors

This option will open the standard Main Information windows you are used to working with for adding gifts and such, but it will display the most recent records you worked with. This is a very easy way to quickly review the the donors and prospects you worked with most recently incase their is something you need to followup on you just remembered, or you want to double-check that you actually made an intended data entry change. Or maybe a donor you talked with earlier on the phone today calls back. You will have all of their account information at your fingertips with this option.

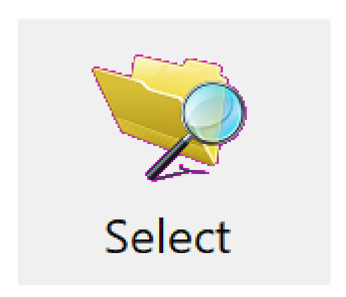
3.3 Selections Menu



The Selections Menu is dedicated to all of the operations you can do with DonorQuest Selections. Since many of the menu options focus on what you can do with existing selection results, you must have the Selection Results window open in order for these options to be active. Without the Selection Results window being open, the menu will still open, but most of the options will be non-selectable (grayed-out).

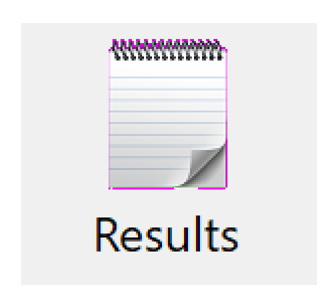
Selections, Run New

Opens the Creating A Selection dialog, so that you may begin a new selection. This is the same as clicking on the Select icon of the DonorQuest tool bar:



Selections, Open Past Results

Opens the Selection Results dialog so that you may work with an existing selection result (to print a report, export, etc.). This is the same as clicking on the Results icon of the DonorQuest tool bar:



Selections, Definitions

Opens a window allowing the viewing and copying of any pre-defined selection, as well as the creation of new custom user-defined selection filters.

Selections, View Contents

Opens the currently highlighted selection result, showing the data within it. Same as clicking the View button on the Selection Results dialog.

Selections, View Conditions

Shows all of the conditions used in creating the currently highlighted selection result as simple text (instead of the form view).

Selections, Print Report From

Allows you to print a report from the currently highlighted selection result. Same as clicking on the Print Report button of the Selection Results dialog.

Selections, Print Mailing Labels From

Allows you to print mailing labels from the currently highlighted selection result. Same as clicking on the Print Labels button of the Selection Results dialog.

Selections, Donor Metrics From

Allows you to run any of the Donor Metrics reports using the donations of the currently highlighted selection result.

Selections, Donor Retention Graphs From

Allows you to run any of the Donor Retention graphs using only the donors of the currently highlighted selection result.

Selections, General Graphs From

Allows you to drive any of the general table-specific graphs, such as the Donation Graphs using the records of the currently highlighted selection result. Same as clicking on the Graphs button of the Selection Results window. The proper graph will open based on the Source Table of the currently highlighted Selection Result.

Selections, Export From

Allows you to export the data within the currently highlighted selection result to a file, or directly to Excel. Same as clicking on the Export button of the Selection Results dialog.

Selections, Do Mass Email From

Allows you to send a mass email to all of the people of the currently highlighted selection result for which there is an email on file.

Selections, Find A Past Result

Allows you to search within the Selection Results dialog for a past result by the result description. You need only enter part of the result description. Same as clicking on the Find button of the Selection Results dialog.

Selections, Find Next

Used in conjunction with the Find A Past Result option, this will continue the search by selection name for subsequent results. Same as clicking on the Next button of the Selection Results dialog.

Selections, Mark/Unmark, Current Result

Toggles the marked status of the currently highlighted selection result. When performing operations which reference multiple selections (such as combining multiple selections into a final result), you will first need to mark the selections you wish to act upon. This is the same as clicking the Mark button of the Selection Results dialog. Note that you may mark/unmark multiple consecutive selection results by holding down the Alt key on your keyboard, then holding down the M key.

Selections, Mark/Unmark, Mark All

Marks all selection results for processing.

Selections, Mark/Unmark, Mark All With Dependencies

Marks all selection results which were used in creating one or more later results.

Selections, Mark/Unmark, Mark All With No Dependencies

Marks all selection results which have no connections to any other later results, and which may therefore be deleted.

Selections, Mark/Unmark, Unmark All

Unmarks all previously marked selection results.

Selections, Combine All Marked Results (Union Set)

This will create an entirely new selection result which combines all of the selection results you have marked. Duplicates are automatically eliminated during the process.

Selections, Find Records Common To All Marked Results (Intersection Set)

This will create an entirely new selection result which intersects all of the selection results you have marked. That is, the new result will contain all of the records which the marked results have in common.

Selections, Subtract One Or More Selection Results From Another (Difference Set)

This will create an entirely new selection result which has only the records which are unique to one of two or more results you have marked. Once you have marked all of the selection results you wish to process, leave the one selection highlighted which you wish the others to be subtracted from.

Selections, Create The Inverse Of As A New Result (Inverse Set)

This will create an entirely new selection result which has all of the records in the database (for the table on which the selection is based) which are not in the currently marked selection. Note that only one selection at a time may be marked and processed with this option.

Selections, Convert To Header Orientation As A New Result

This will create a new selection based on the Header table (where donor name/address information is stored) from a selection result which was based on the donations, pledges, memos, extra address, linkages, or contacts table.

Selections, Append To A Dataset...

This will actually copy the records referenced by a selection to one of the other datasets. There are three datasets in DonorQuest, and each selection must be based on one of them. This operation permits mass copying of records from one dataset to another. For example, say you ran a selection to find old inactive records which you would like to transfer out of the main donor dataset to the archive dataset. You would first highlight the selection result built from the donor dataset you wish to process, then click on Selections, Append To A Dataset, Archive. Click Yes for the confirmation prompt. Now those records exist in both the donor and archive datasets. To complete the move, you would then mass delete the records from the donor dataset by clicking on Selections, Mass Data Operations Via, Mass Data Deletion Via. Since you are deleting actual records, you will see several confirmation prompts.

Selections, Update Solicitation History Via, Create New Entries

This will record that you are sending a solicitation to all of the names of the selection result you currently have highlighted. The record of the solicitation will be a permanent part of each donor or prospect account, and DonorQuest will track the response rate from each solicitation as donations come in.

Selections, Update Solicitation History Via, Resequence Solicitation Entry IDs

Eliminates any gaps in the solicitation numbering caused by manual deletion of solicitation tracking information from a donor's account.

Selections, Mass Data Operations Via, Donation Addition

Adds the same donation to all donors in the currently highlighted selection result. You will be prompted for the donation to add.

Selections, Mass Data Operations Via, Pledge Addition

Adds the same pledge to all donors in the currently highlighted selection result. You will be prompted for the pledge to add.

Selections, Mass Data Operations Via, Memo Addition

Adds the same memo to all donors in the currently highlighted selection result. You will be prompted for the memo to add.

Selections, Mass Data Operations Via, Extra Address Addition

Adds the same extra address to all donors in the currently highlighted selection result. You will be prompted for the extra address to add.

Selections, Mass Data Operations Via, Linkage Addition

Adds the same linkage to all donors in the currently highlighted selection result. You will be prompted for the linkage to add.

Selections, Mass Data Operations Via, Scheduled Contacts Addition

Adds the same scheduled contact to all donors in the currently highlighted selection result. You will be prompted for the scheduled contact to add.

Selections, Mass Data Operations Via, List Code Addition

Adds the a specific list code to all donors in the currently highlighted selection result. You will be prompted for the list code to add.

Selections, Mass Data Operations Via, List Code Replacement

Searches the existing list code of each donor in the currently highlighted selection result, and replaces all occurrences of that list code with a new code. You will be prompted for both the old code to replace, and the new code to replace it with.

Selections, Mass Data Operations Via, Field Value Replacement

Allows you to replace the value of any DonorQuest field with a specific value, or the value given by an expression, for all of the record in the currently highlighted selection result.

Selections, Mass Data Operations Via, Mass Data Deletion Via

Allows you to delete all of the records referenced in a selection result. If the selection was built from the Header table, then this operation will delete entire donor accounts.

Selections, Edit Selection Result Description

Whenever you run a selection, you should give it a meaningful name which describes the data you are selecting. If you forget to name a selection, or you wish to rename it, use this option.

Selections, Refresh Result

Brings the highlighted selection up to date by examining any data which has changed since the selection was originally run. You may mark multiple selection results and refresh them all at once. This is the same as pressing the refresh button on the Selection Results window. Note that refreshing a selection will not add back in records which were manually removed from the selection unless those records were edited in some way.

Selections, Rebuild Result

Brings the highlighted selection up to date by completely rerunning the selection as if it were new. You may mark multiple selection results and rebuild them all at once. This is the same as pressing the rebuild button on the Selection Results window.

Selections, ReSelect Result

This allows you to make corrections to the conditions of the selection if you find the data is not what you expected. The selection will be run again with the edited conditions. This is the same as pressing the ReSelect button on the Selection Results window.

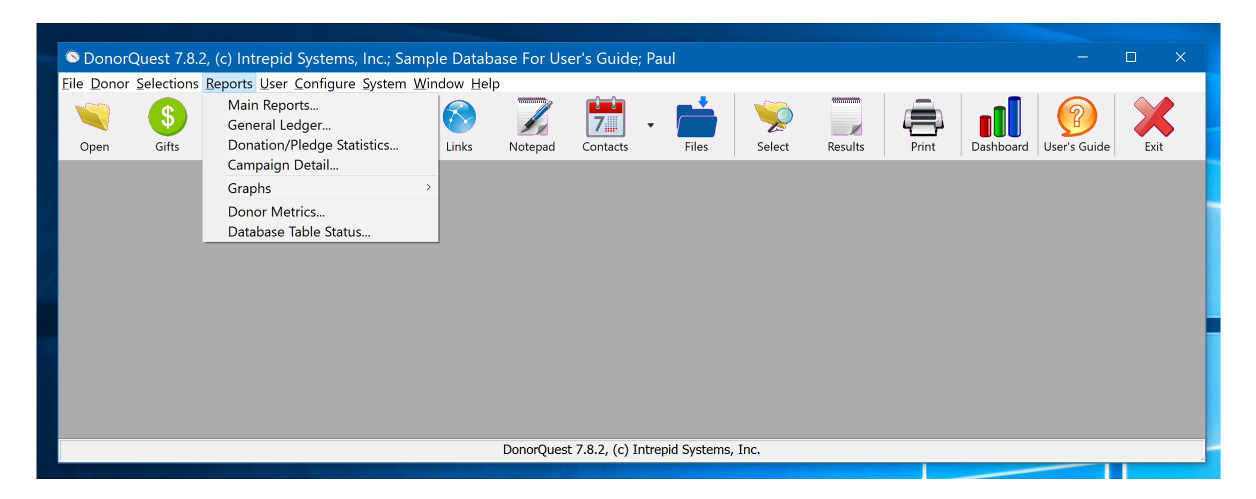
Selections, ReSelect Result New

This allows you to create an entirely new selection, based on the conditions of the existing result. This is handy if you wish to leave an existing selection result alone, but use it as a starting point for a new selection with additional conditions. This is the same as pressing the ReSelect New button on the Selection Results window.

Selections, Delete Result

Permanently deletes the highlighted selection result, or all marked results. This is the same as pressing the Delete button on the Selection Results window.

3.4 Reports Menu



The Reports Menu is the central access point for all reports in DonorQuest.

Main Reports

The Main Reports option will close all open windows and active the standard DonorQuest reports menu containing the over 400 standard DonorQuest reports, but it will do so directly, allowing each report to be run outside of a Selection filter, and independently of any records you may have marked in the Main Information window. Both the tool bar Print icon and the File, Print/Setup A Report menu will always defer to any highlighted Selection Result or Main Information record, effectively filtering the output of any report you then select from the report menu.

General Ledger

Launches the General Ledger Process which prints an optional deposit report for donation batches, and also generates the Word mail merge files used for thank-you letters.

Donation / Pledge Statistics

DonorQuest gathers statistics for Donations and Pledges. Specifically, it focuses on the Donation/Pledge Type, Account, Stimulus, Fund, and Appeal fields. This option will allow you to view and print these statistics.

Campaign Detail

Campaign Detail can be viewed for donation and pledge totals or for specific campaigns (stimulus codes). This option will allow you to view and print this detail.

Graphs, Constituent Counts

This simple graph shows you a count of constituent acquisitions over time. You may also use it with a head-based Selection Result to filter the constituents being counted.

Graphs, Donation Graphs

Donation Graphs are designed to give you the big picture of how your organization has been doing over time in terms of actual revenue.

Graphs, Pledge Graphs

Pledge Graphs are similar to Donation Graphs, but instead show you things such as total pledged, total paid, combined remaining balance, etc.

Graphs, Memo Graphs

Memo Graphs will show you a count of memos added by years, months, day, and weeks. Additional filters are available for showing specific quarters or months.

Graphs, Scheduled Contact Graphs

Contact Graphs will show you a count or grant amount totals of contacts by years, months, day, and weeks. Additional filters are available for showing specific quarters or months. You may also chose the target date being graphed across time to Last Contact, Next Contact, Date Grant Request Made, Date Request Acknowledged, Date Decision Made, Date of First Payment, and Date Grant Added. Target amount field may be set to Amount Requested, Amount Granted, Difference, Total Paid, Balance Remaining for a grant, etc.

Graphs, Donor Retention Graphs

Donor Retention Graphs will show you for each year, what percentage of the donors who gave also gave in the previous year. Time interval may also be set to months. When viewing by years, a filter may be set for specific quarters and months of each year.

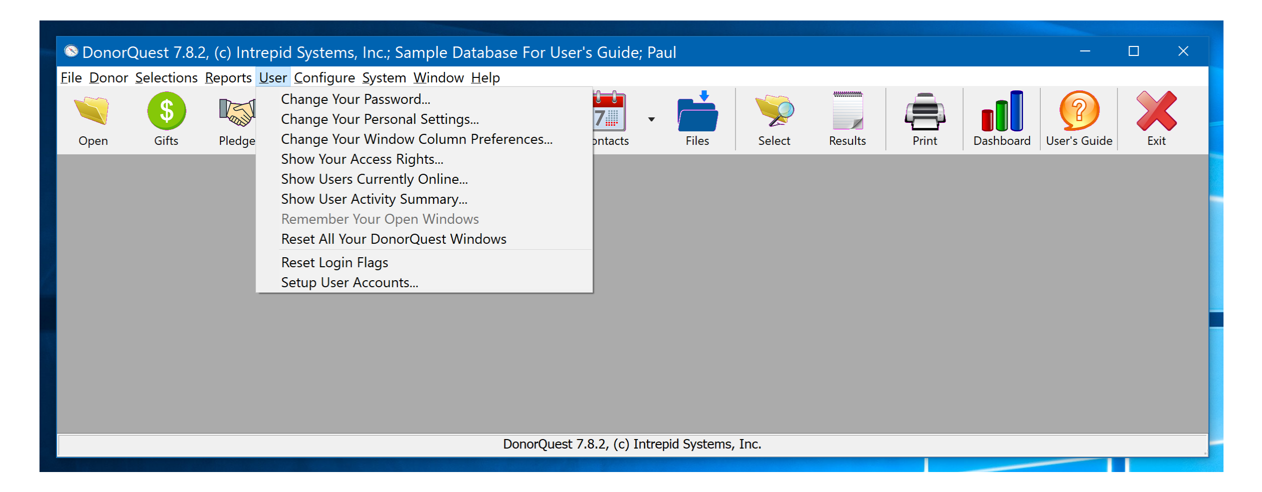
Donor Metrics Reports

The Donor Metrics series of reports essentially allow you to compare statistical changes in donor giving behavior between multiple time periods. The metrics shown are Total Number of Donors, Number of New Donors, Number of Repeat Donors, Total Number of Donations, Dollar Total of Donations, Average Donation Amount, and Average Number of Gifts Per Donor. In addition to these metrics being shown in total for each period, the same metrics are also shown broken down by donation amount range. All aspects of the report are customizable, including the specific time periods compared, and the specific donation amount ranges shown. Due to the large number of columns on these reports, they go well beyond what can easily be displayed on paper or in a PDF document format. Therefore they are viewed in a spreadsheet-style data grid, and can only be output to file or Excel.

Database Table Status

The Database Table Status gives you a quick overview of the number of records in the various DonorQuest data tables.

3.5 User Menu



The User Menu supports operations concerning user accounts in DonorQuest. The first six options of this menu only affect your user account. The last two options are normally turned off unless your user account has been given administrator privileges, as these last two options will affect other user accounts.

User, Change Your Password

Allows you to change the password you use to login with.

User, Change Your Personal Settings

Allows you to change your personal preferences in DonorQuest.

User, Change Your Window Column Preferences

Opens a special setup window allowing you to choose which columns are shown in the various spreadsheet-style data windows, as well as arrange the left-to-right order of these columns. The changes you make here are specific to your login account and will not affect other users. While similar changes may be made interactively in the actual data windows when they are open (via left-mouse-click-and-drag to move and right-mouse-click to hide/unhide a column), this method is far easier when making a lot of changes.

User, Show Your Access Rights

Allows you to view the access rights you have been given in DonorQuest by your system administrator.

User, Show User Currently Online

Allows you to see who else is using DonorQuest. You should check this before running any system maintenance operation which generally requires that you be the only user logged in.

User, Remember Your Open Windows

This will cause DonorQuest to always open your preferred windows when you click on the Open button of the DonorQuest tool bar. This option is only available when you have one or more of the basic display grids open, such as the Main Information Window, Donations, Contacts, etc.

User, Reset All Your DonorQuest Windows

As you use DonorQuest and move/resize the various windows, or even when you resize or move columns with each window, DonorQuest will remember these changes and will always open the windows to the state in which you left them when they were last opened. This is remembered under your user account, so each user may have their own custom window placement and configuration settings in DonorQuest. If you ever need to restore your DonorQuest windows to their default state, click on the User, Reset All Your DonorQuest Windows option.

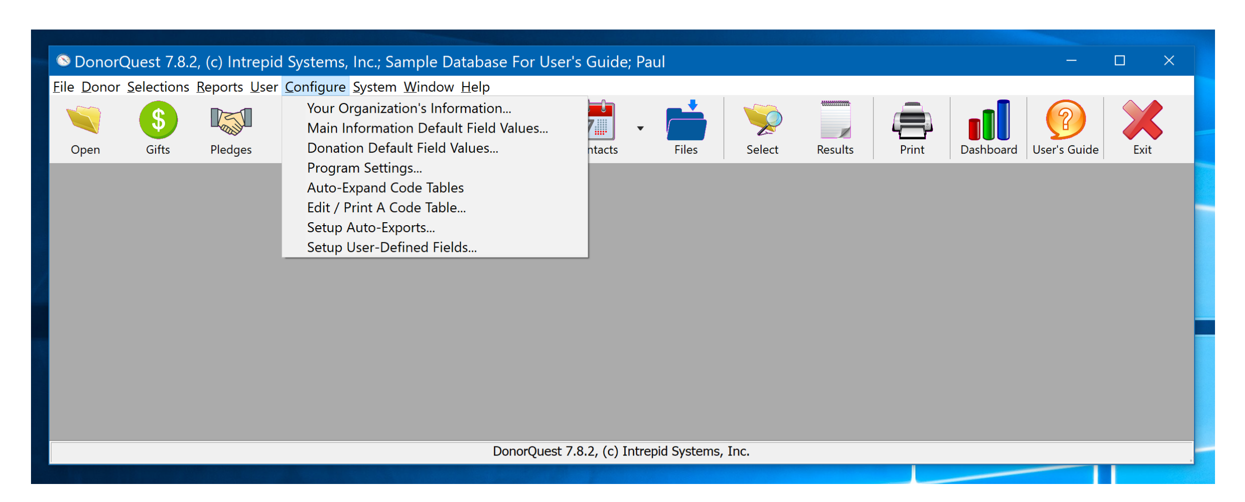
User, Reset Login Flags

DonorQuest keeps track of who it thinks is logged in, and so does your actual file server. Normally DonorQuest agrees with what your file server's accounting of this is, but if a workstation's connection to the file server is interrupted, the two lists of who is in may differ. If this happens, have other users log off and click on User, Reset Login Flags. This will reset DonorQuest's internal track of who is logged in to match that of the file server. Note that you must have an administrator level account in DonorQuest to have access to this option.

User, Setup User Accounts

Allows you to add and delete DonorQuest users. Note that you must have an administrator level account in DonorQuest to have access to this option.

3.6 Configure Menu



The Configure Menu allows you to customize the behavior of DonorQuest.

Configure, Your Organization's Information

Allows you to set the basic contact information for your organization which is used on various reports and DonorQuest displays.

Configure, Main Information Default Values

Allows you to set the default values which DonorQuest will automatically enter for you when creating a new constituent account. These values are just a starting point - you can override any of them before saving the new record.

Configure, Donation Default Field Values

Allows you to set the default values which DonorQuest will automatically enter for you when adding a new donation. These values are just a starting point - you can override any of them before saving the new record.

Configure, Program Settings

Allows you to set the basic program settings used in DonorQuest.

Configure, Auto-Expand Code Tables

Expands the drop-down choices for the various coded fields in DonorQuest by searching the actual database, looking for codes which were used in the past, but which have since been deleted from the drop-down code table lists.

Configure, Edit / Print A Code Table

Allows you to edit and delete existing codes from the drop-down lists used in data entry.

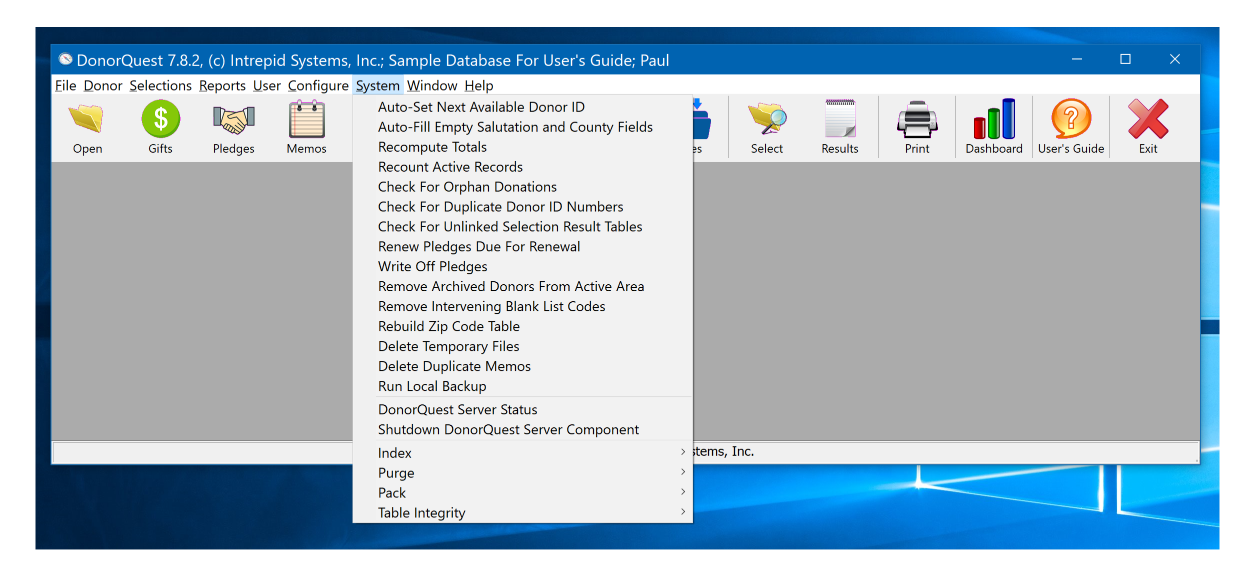
Configure, Setup Auto-Exports

Allows you to setup the automatic recurring data queries and exports DonorQuest will do on a regular basis.

Configure, Setup user-Defined Fields

Allows you to add and delete user-defined fields within DonorQuest.

3.7 System Menu



The System Menu is dedicated to maintenance procedures in DonorQuest. All of the needed procedures are normally run automatically as needed by DonorQuest, however there may be times when a particular procedure needs to be run manually.

System, Auto-Set Next Available Donor ID

Selecting Auto-Set Next Available Donor ID from the System menu will tell DonorQuest to look at all donors in your database, searching for the largest ID number in use. Once this is found, DonorQuest will set the Next Available Donor ID to this number, plus one.

System, Auto-Fill Empty Salutation and County Fields

Selecting Auto-Fill Empty Salutation and County Fields from the System menu will cause DonorQuest to process your entire database, filling in any missing Salutation and County fields.

System, Recompute Totals

Selecting Recompute Totals from the System menu will tell DonorQuest to process the entire database, recalculating giving totals for all donors.

System, Recount Active Records

Selecting Recount Active Records from the System menu will tell DonorQuest to examine your database, counting and setting the number of active records. This will enable on-screen displays to build very quickly.

System, Check For Orphan Donations

Selecting Check For Orphan Donations from the System menu will tell DonorQuest to search and delete any donation records for which there are no donor records.

System, Check For Duplicate Donor ID Numbers

Selecting Check For Duplicate Donor ID Numbers from the System menu will tell DonorQuest to check for any duplicate ID's in your database. This should normally never happen, but may happen if your network connection is unstable and you have not enabled Duplicate ID Compensation under the Program Settings.

System, Check For Unlinked Selection Result Tables

Selecting Check for Unlinked Selection Result Tables from the System menu will tell DonorQuest to check for and delete any selection results which are found to exist, but which have no corresponding entry in the Selection Results window.

System, Renew Pledges Due For Renewal

Selecting Renew Pledges Due For Renewal from the System menu will tell DonorQuest to process all pledges on file, and renew pledges which have expired, but which qualify for renewal (such as pledges for membership dues or subscriptions).

System, Write Off Pledges

Selecting Write Off Pledges from the System menu will tell DonorQuest to process all pledges on file, and write off those which are past due by a specified number of days.

System, Remove Archived Donors From Active Area

Selecting Remove Archived Donors From Active Area from the System menu will tell DonorQuest to remove any donor records from the main Donor dataset which also exist in the Archive dataset.

System, Remove Intervening Blank List Codes

Selecting Remove Intervening Blank List Codes from the System menu will tell DonorQuest to process all constituent records, cleaning up the list fields.

System, Rebuild Zip Code Table

Selecting Rebuild Zip Code Table from the System menu will tell DonorQuest to explore all

of your name/address records, expanding the zip code validation table built into DonorQuest to include any additional unique city/state/zip combinations found in your actual data that are not in the standard USPS-provided zip code table.

System, Delete Temporary Files

Selecting Delete Temporary Files from the System menu will tell DonorQuest to delete any unneeded temporary files. This normally happens automatically, but you can trigger it by hand to free up additional disk space.

System, Delete Duplicate Memos

Selecting Delete Duplicate Memos from the System menu will tell DonorQuest to search the entire database, removing any duplicate memo entries.

System, Run Local Backup

Selecting Run Local backup from the System menu will tell DonorQuest to make a backup copy of all your entire database, including any customizations to DonorQuest, as well as all of the system settings.

System, DonorQuest Server Status

Selecting DonorQuest Server Status from the System menu will display whether or not the DonorQuest Server Component is running.

System, Shutdown DonorQuest Server Component

Selecting Shutdown DonorQuest Server Component from the System menu will send a command to the server to shutdown the DonorQuest Server Component if it is currently running.

System, Index...

Selecting one of the options of the System, Index menu will direct DonorQuest to rebuild either specific index files, or all index files.

System, Purge, Buffer Tables

Selecting Purge, Buffer Tables from the System menu will tell DonorQuest to delete all of the information in the Buffer Dataset.

System, Purge, Posting File

Selecting Purge, Posting File from the System menu will tell DonorQuest to delete all of the information in the Donation Posting file, which (when DonorQuest is running in deferred posting mode) is used for temporary storage of newly entered donations until they are approved and posted to the respective donor accounts. When not running DonorQuest in deferred posting mode, this file simply stores copies of the most recently added donations for convenient viewing via the File, Open, Posting File option.

System, Purge, Local Report Cache

Selecting Purge, Local Report Cache from the System menu will tell DonorQuest to purge the local report cache stored on your workstation, which is used to speed reporting. Purging your local report cache will cause DonorQuest to completely rebuild it when you next run a report. In theory this is never necessary, but if you are running DonorQuest on an old-style peer-to-peer network in file share mode and your office suffers a power failure while DonorQuest is updating files, you may need to run this option to resynchronize your local report cache with what is on your in-house file server. This option does not apply to the DonorQuest cloud-based service.

System, Purge, Server Queue

Selecting Purge, Server Queue from the System menu will tell DonorQuest to purge the queue of DonorQuest tasks awaiting processing on the file server.

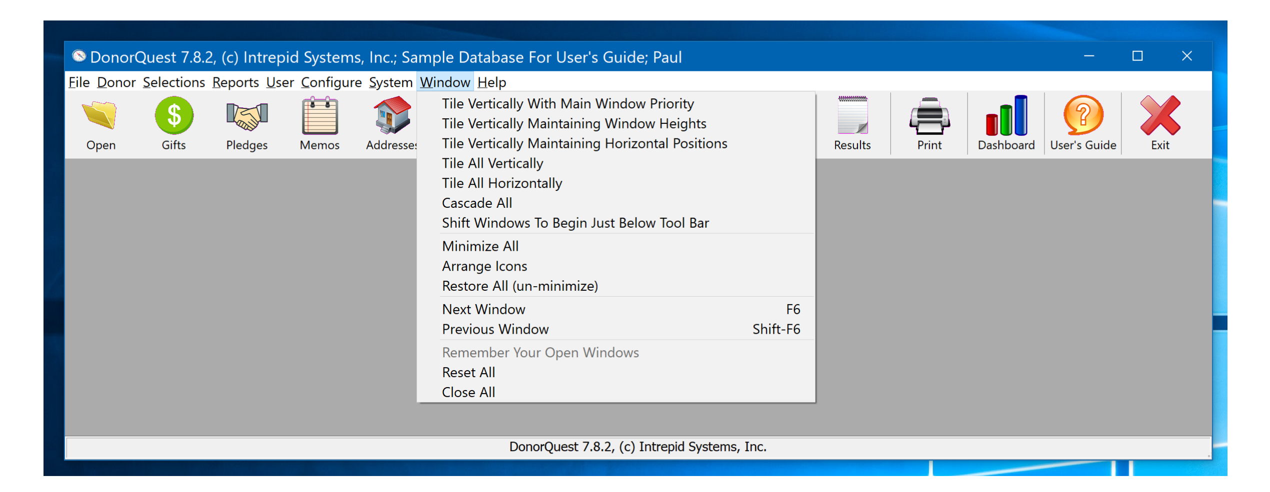
System, Pack...

Selecting one of the options of the System, Pack menu will direct DonorQuest to pack specific data tables. Packing is the process of permanently removing deleted records to free up disk space and make the database more efficient. DonorQuest will normally prompt when it is time to do a pack, based on the percentage of deleted records which exist.

System, Table Integrity...

Selecting one of the options of the System, Table Integrity menu will direct DonorQuest to check the integrity and/or perform structural updates to the DonorQuest data tables.

3.8 Window Menu



The Window Menu offers positioning control over the currently open DonorQuest data windows. It also offers quick access to any currently open DonorQuest window, regardless of the window's state (minimized or not), or position relative to other open windows. Below the static menu options shown above, the window menu will grow to show the names of all currently open windows, allowing you to shift focus to any one specific window very quickly, even if it is partially or completely hidden by another window.

Window, Tile Vertically With Main Window Priority

Great for users with smaller displays, this option arranges all open windows vertically, but giving the Main Information window a full half of the available vertical screen space. To use this display mode, first open all the windows you routinely use by clicking on the corresponding icon on the DonorQuest tool bar. For example, click the Donations icon, followed by the Contacts icon. Then click on the Window menu, and choose, Tile Vertically With Main Window Priority. This will create a split screen view with the main name/ address grid taking up the top half of your screen, and all other windows set to the same half-screen size, but placed on top of each other on the lower half of your screen. Now, all you have to do is click the Donations or Contacts icons to switch between the Donation and Contact windows, with each window making optimal use of the available space on your screen when it is selected. In this mode, the toolbar icons effectively become tabs for the lower windows. You may also press the F6 key and the Shift-F6 key combination to move between open DonorQuest windows without having to take your hands off the keyboard.

Tile Vertically Maintaining Window Heights

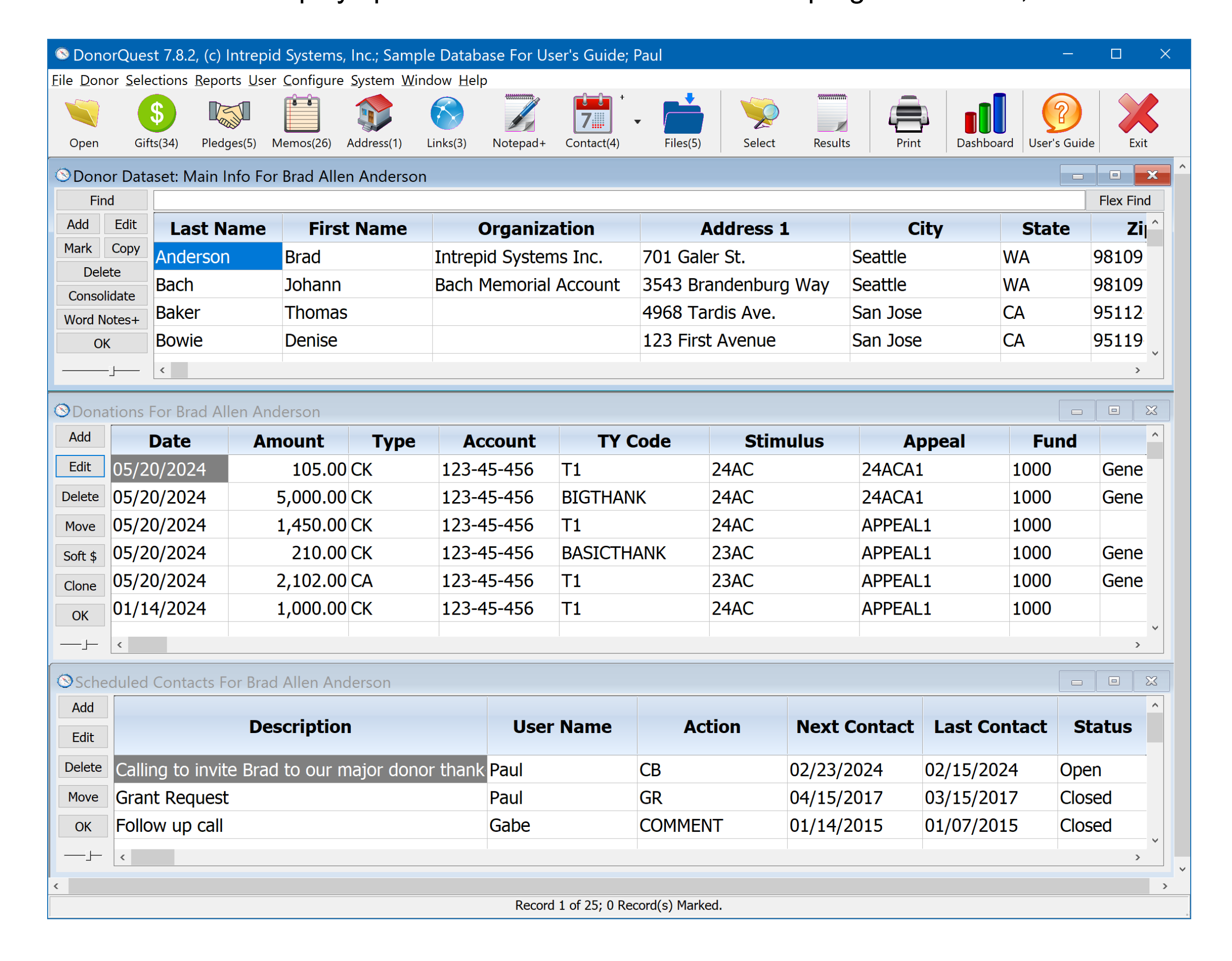
Clicking on the Window menu and choosing Tile Vertically Maintaining Window Heights will arrange all open windows vertically without changing their heights. They will extend into an "infinite" vertical space, accessed by scrolling, or clicking the corresponding tool bar icons to immediately jump to a specific window.

Tile Vertically Maintaining Horizontal Positions

Clicking on the Window menu and choosing Tile Vertically Maintaining Horizontal Positions is very similar to the above tiling option, but any custom horizontal placement of your windows will remain intact. So for example, if you have the Donations and Pledges windows positioned side-by-side, they will remain side-by-side, but will both be moved up or down to fill in any gaps which may exist between the windows above and below them.

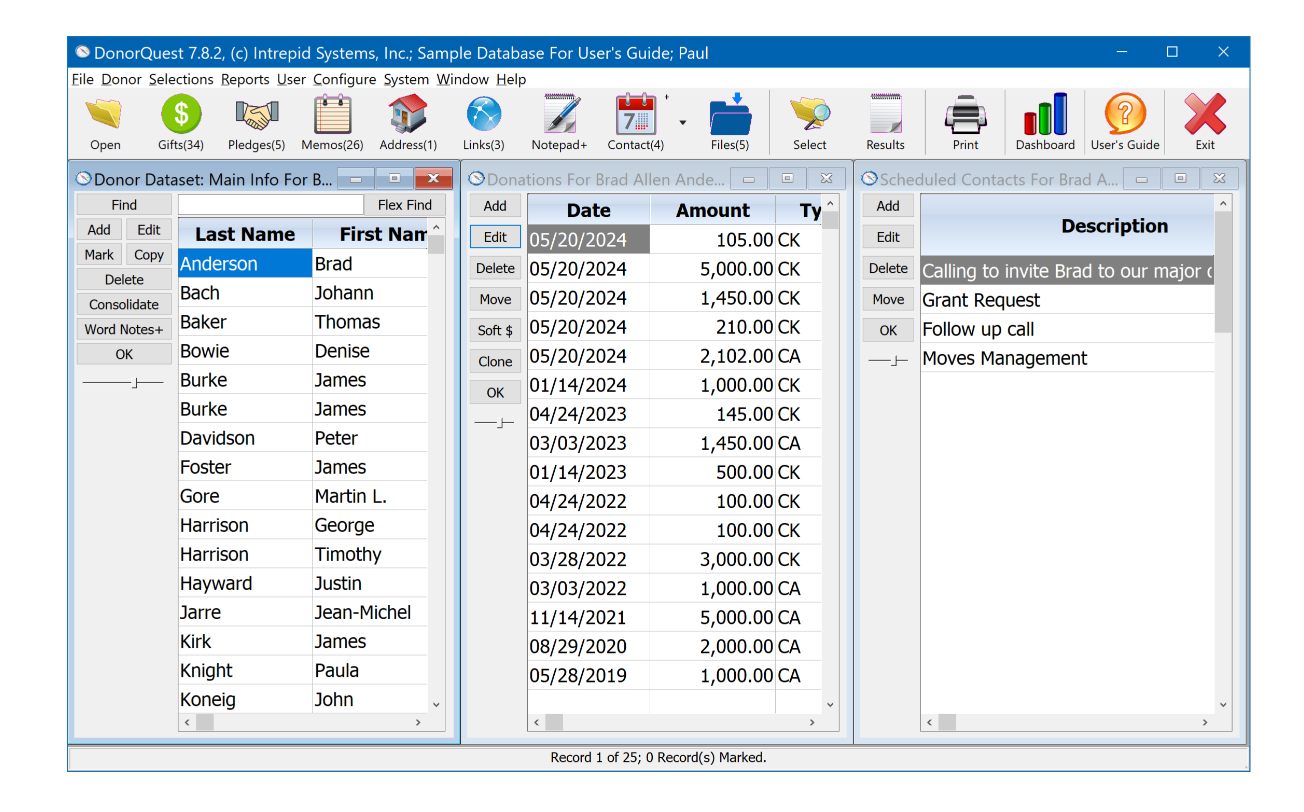
Window, Tile All Vertically

Arranges all open windows vertically, with each window getting an equal amount of available vertical display space within the main DonorQuest program window, like this:



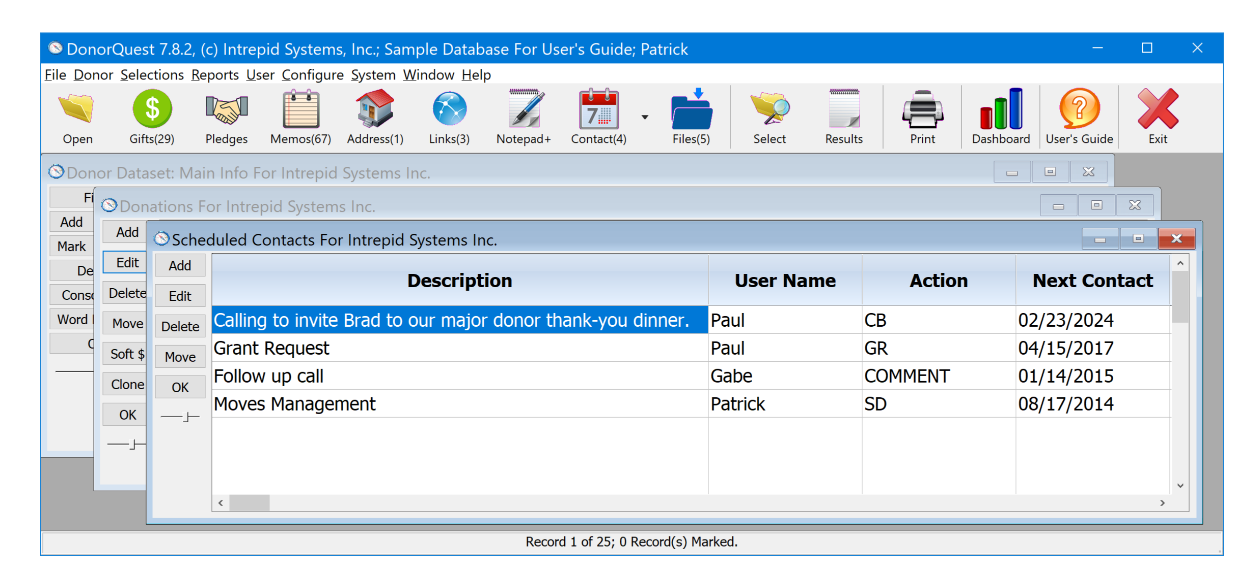
Window, Tile All Horizontally

Arranges all open windows horizontally, with each window getting an equal amount of available horizontal display space within the main DonorQuest program window, like this:



Window, Cascade All

Arranges all open windows in a cascading pattern, like this:

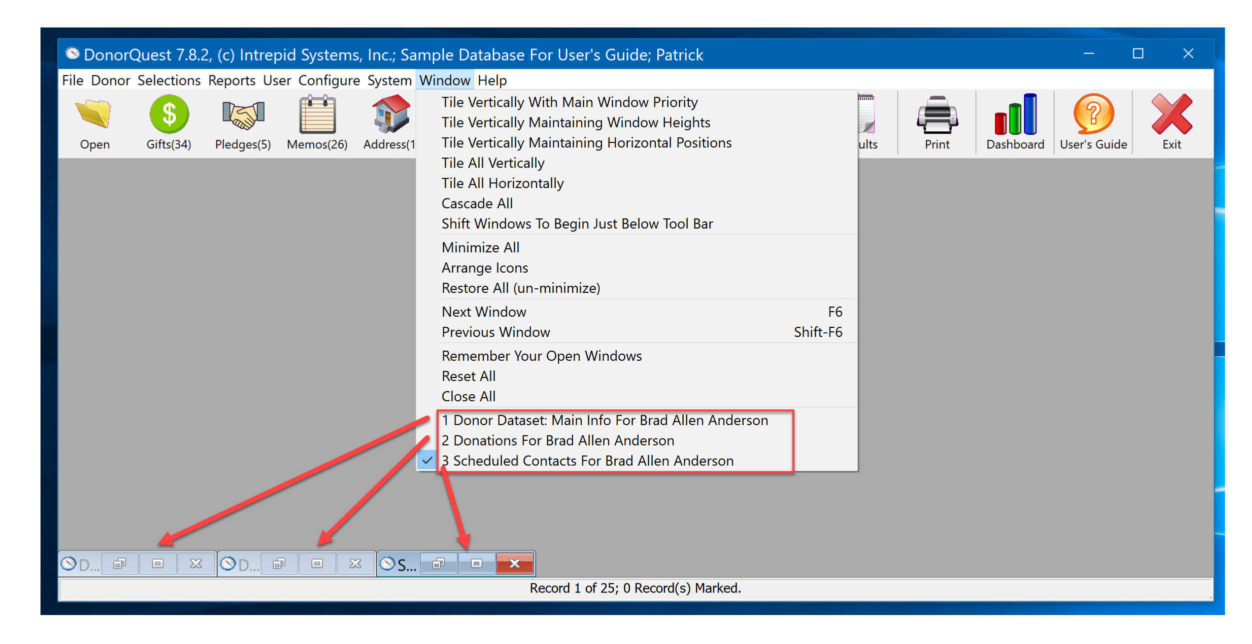


Window, Shift Windows To Begin Just Below Tool Bar

Moves all windows up as needed to start just below the DonorQuest Tool Bar.

Window, Minimize All

Reduces all open windows to icons, keeping them open but freeing display space for other things, like this:



Window, Arrange Icons

Arranges any minimized windows at the bottom of the main DonorQuest program window. This is normally where all minimized windows are placed when the Minimize All option is used, but if you expand the main DonorQuest program window after using the Minimize All option, this option is useful for again placing the minimized windows at the bottom of the main DonorQuest program window (as shown above). Likewise, if you shrink the main DonorQuest program window so that the minimized windows are no longer in view, this option will move the minimized windows up to once again display nicely along the bottom of the main DonorQuest program menu.

Window, Restore All (un-minimize)

Restores all minimized DonorQuest windows to the size and position they held before they were minimized.

Window, Next Window

Cycles forward through all currently open DonorQuest windows, shifting focus from one window to the next. Same as pressing the F6 key on your keyboard.

Window, Previous Window

Cycles backwards through all currently open DonorQuest windows, shifting focus from one window to the previous. Same as pressing the Shift-F6 key combination on your

keyboard.

Window, Remember Your Open Windows

Causes DonorQuest to remember the windows you have open, so that they will all be opened again the next time you click on the Open button on the DonorQuest tool bar. This also is the same as clicking on User, Remember Your Open Windows.

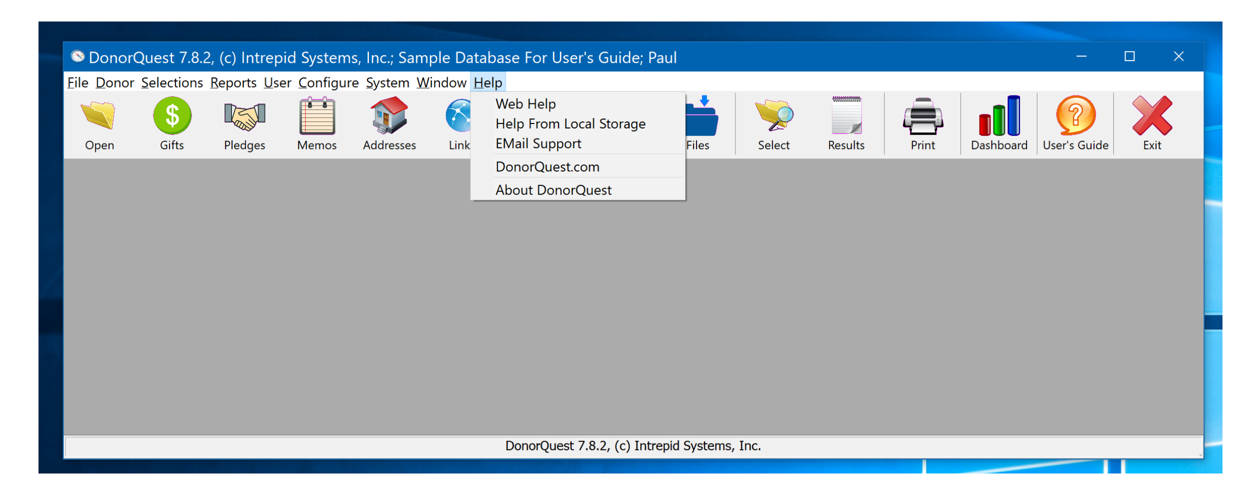
Window, Reset All

As you use DonorQuest and move/resize the various windows, or even when you resize or move columns with each window, DonorQuest will remember these changes and will always open the windows to the state in which you left them when they were last opened. This is remembered under your user account, so each user may have their own custom window placement and configuration settings in DonorQuest. If you ever need to restore your DonorQuest windows to their default state, click on the User, Reset All Your DonorQuest Windows option. This also is the same as clicking on User, Reset All Your DonorQuest Windows.

Window, Close All

This will simply close all open DonorQuest windows.

3.9 Help Menu



The Help Menu has only three options - one to open the online version of DonorQuest Help which allows you to view the User's Guide through a web browser on multiple devices (such as tablets and phones as well as laptop and desktop computers), one to open a copy of the User's Guide stored on your computer (which doesn't require an Internet connection), and finally an option to display information about the particular release of

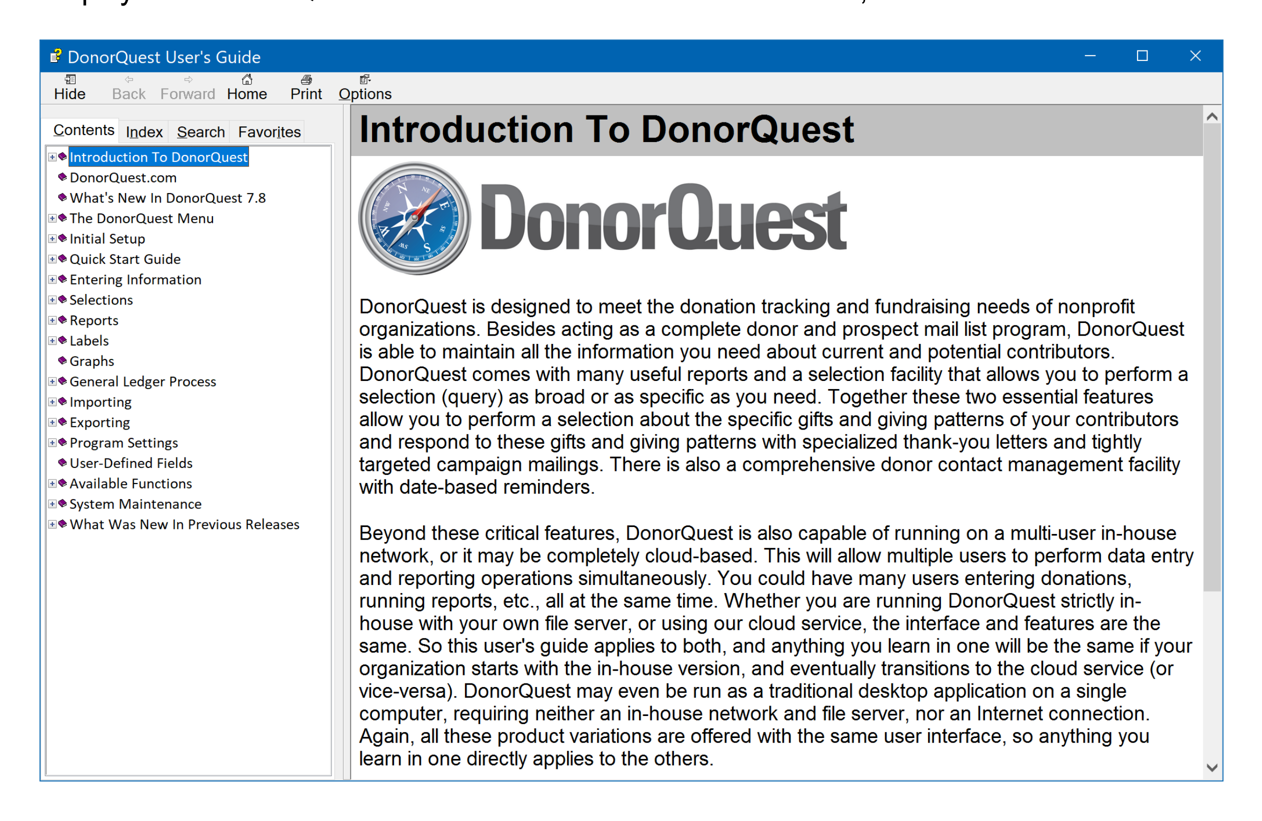
DonorQuest you are running.

Help, Web Help

Displays the DonorQuest User's Guide in a web browser, allowing viewing of the User's Guide from a variety of devices including tablets and phones as well as traditional laptop and desktop computers. By default, the Web Help option is used when you click on the User's Guide icon on the DonorQuest toolbar.

Help, Help From Local Storage

Displays this DonorQuest User's Guide in a searchable window, like this:



Help, Email Support

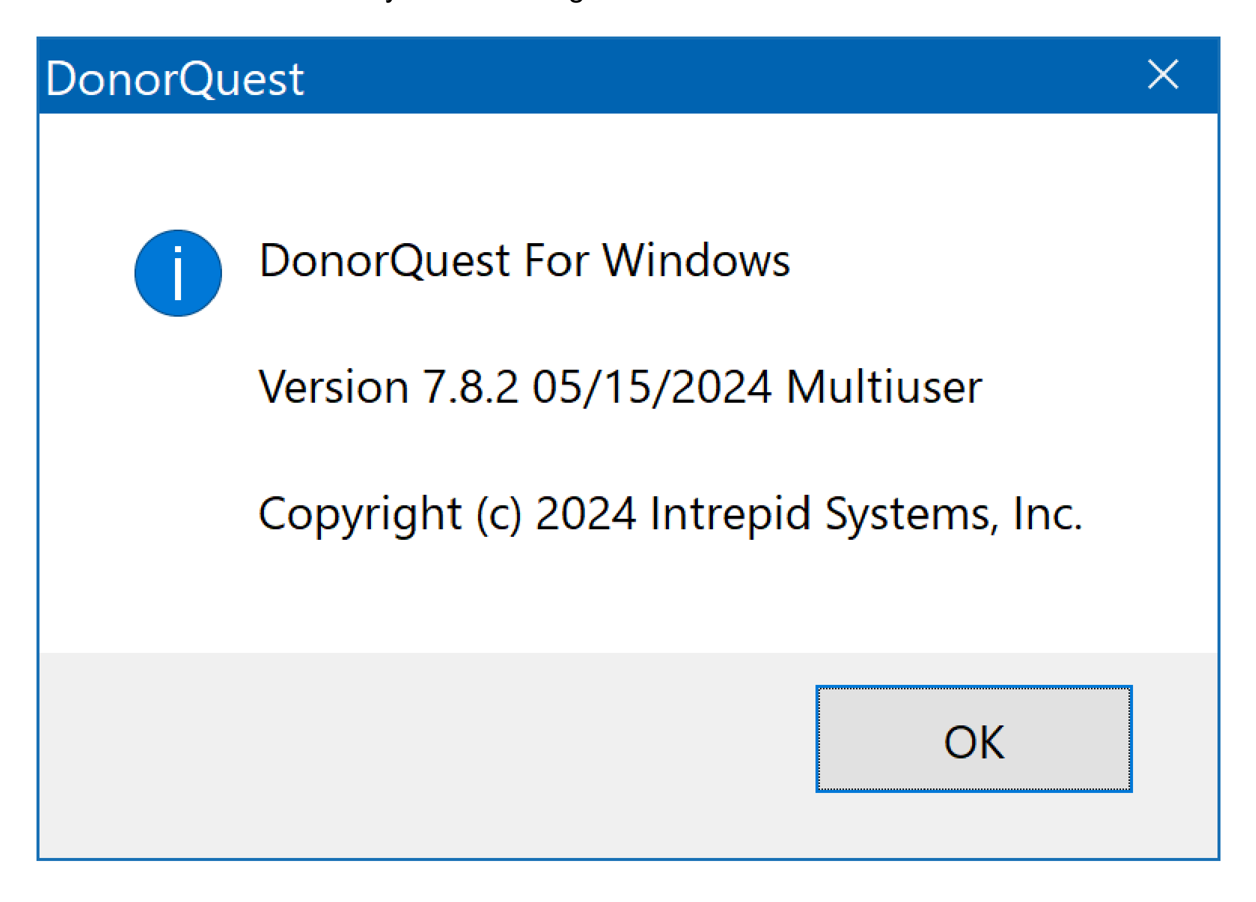
Opens your email client and begins an email addressed to DonorQuest Support. A representative will generally respond within an hour during our business hours of Monday-Friday, 6:00am to 5:00pm Pacific Time.

Help, DonorQuest.com

Opens our website in your default browser.

Help, About DonorQuest

Displays the DonorQuest version number, copyright, multi-user status, and build date for the version of DonorQuest you are running:



Topic IV

4 Initial Setup

Every non-profit is unique. Fundraising and Constituent Relationship Management software which tries to be all things to all users right out of the box winds up being bloated, complicated, and slow. DonorQuest takes a different approach. We provide the core functionality which most nonprofits need right out of the box so you can be immediately productive with DonorQuest -- including over four hundred standard reports, each of which can be customized. We also provide an advanced data import facility to get any existing data you have into DonorQuest. And from there on DonorQuest starts to learn. It learns which data windows each user needs to work in, where to position them on the screen, how they are to be sized, which column order is preferred, etc. At the organizational level DonorQuest learns about your campaigns and how to code gifts consistently so that you can ask meaningful questions about the data you have entered. These campaign and other codes are shared by all users so that data entry is uniform and consistent, which in turn enables accurate and informative reporting.

DonorQuest comes pre-configured with sample codes and user accounts, one of which is the Guest account which you likely used to gain initial access the first time you started DonorQuest. But as an administrator, you will need to add accounts for each person who will be using DonorQuest, along with setting up donation tracking and other codes which are specific to your organization. There are also some basic configuration settings you may wish to change to best suit your organization's needs. This chapter will cover all of these topics.

4.1 Local Area Network Usage

This topic only applies to the installed version of DonorQuest, not the online (cloud) version. With the online version of DonorQuest, everything on the backend is taken care of for you automatically. You no longer have to worry about hardware configurations, backups, upgrades, etc. It can also be used with Apple Macs and tablets computers, as well as Windows computers. And whether you have a few thousand donors or literally millions of donors it is fast - very fast.

This is an advanced setup topic for system administrators who need to support using the installed version of DonorQuest on a Local Area Network (LAN). If DonorQuest is already installed and you are a beginning user, you should move on to the next topic.

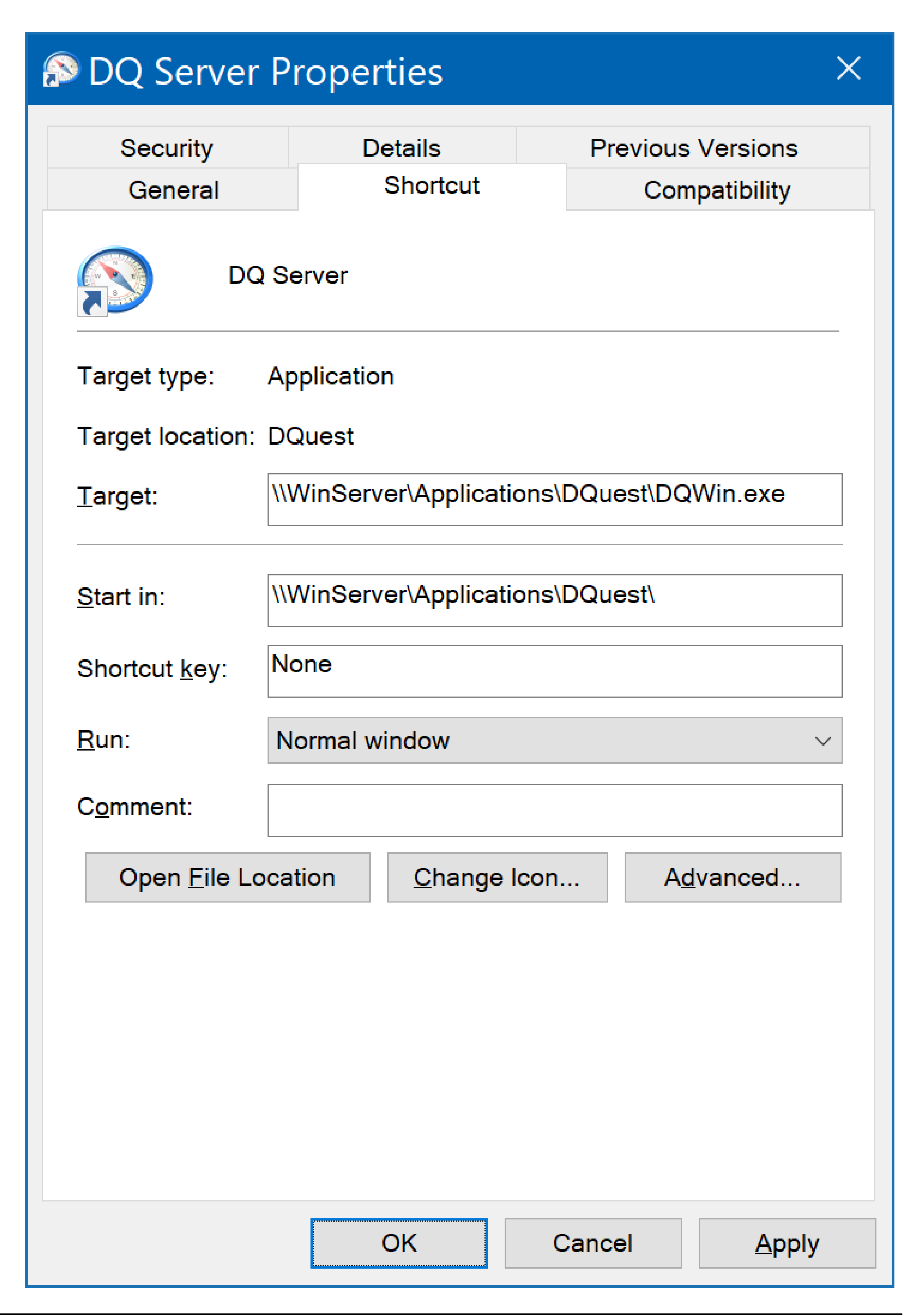
Note that the installed (in-house) version of DonorQuest is designed to be run on a single PC, or on a high-speed wired local area network only -- either peer-to-peer, or with a traditional file server. However, it should NOT be run across a VPN (Virtual Private Network) on a remote (cloud-based) server, or through a network in which any connection point relies on wireless connectivity. If you need remote access or support for wireless connectivity, then you should be using the online version of DonorQuest instead of the in-house version.

Peer-to-peer in-house wired network usage allows you to use an ordinary (inexpensive) windows computer as a file server, avoiding the premium Microsoft charges for a their

server software. DonorQuest is happy to run in either configuration, managing as many simultaneous users as you need on the various workstations in your office. All DonorQuest needs is a shared network folder to function in multi-user mode. Whether that share is provided by a traditional (expensive) file server, or an ordinary PC makes no difference. If you are using one of your workstations to actually house your DonorQuest database, then it is effectively the file server and should be thought of as such when references are made to the file server in this document.

If you are running DonorQuest on a local area network, there is actually no software at all installed on the workstations (unless you are using one workstation as a file server - then the DonorQuest installation will physically exist there). The main program file, DQWin.exe, is launched across a network share on each workstation. While the DonorQuest client is loaded into a workstation's main memory while it runs, there are no DonorQuest program files which exist on the various workstation's internal storage (magnetic hard drive or SSD). Everything is on the server, both program and data. The nice thing about this centralized configuration is that performing a DonorQuest software upgrade simply consists of updating the DonorQuest installation on the server. There is no software to update on the workstations. The only thing resident on each workstation is a simple desktop shortcut used to launch DonorQuest. Enabling a new workstation to run DonorQuest is simply a matter of creating a desktop shortcut on the workstation which references the DQWin.exe application file in the shared DonorQuest folder on the server (the DonorQuest folder is usually named \DQuest\ but may have been given a different name during the initial DonorQuest installation).

For example, a workstation shortcut with the following properties:


DQ Server Properties
Security
Details
Previous Versions
General
Shortcut
Compatibility
DQ Server
Target type: Application
Target location: DQuest
Target: \\WinServer\Applications\DQuest\DQWin.exe
Start in: \\WinServer\Applications\DQuest\
Shortcut key: None
Run: Normal window
Comment:
Open File Location
Change Icon...
Advanced...
OK
Cancel
Apply

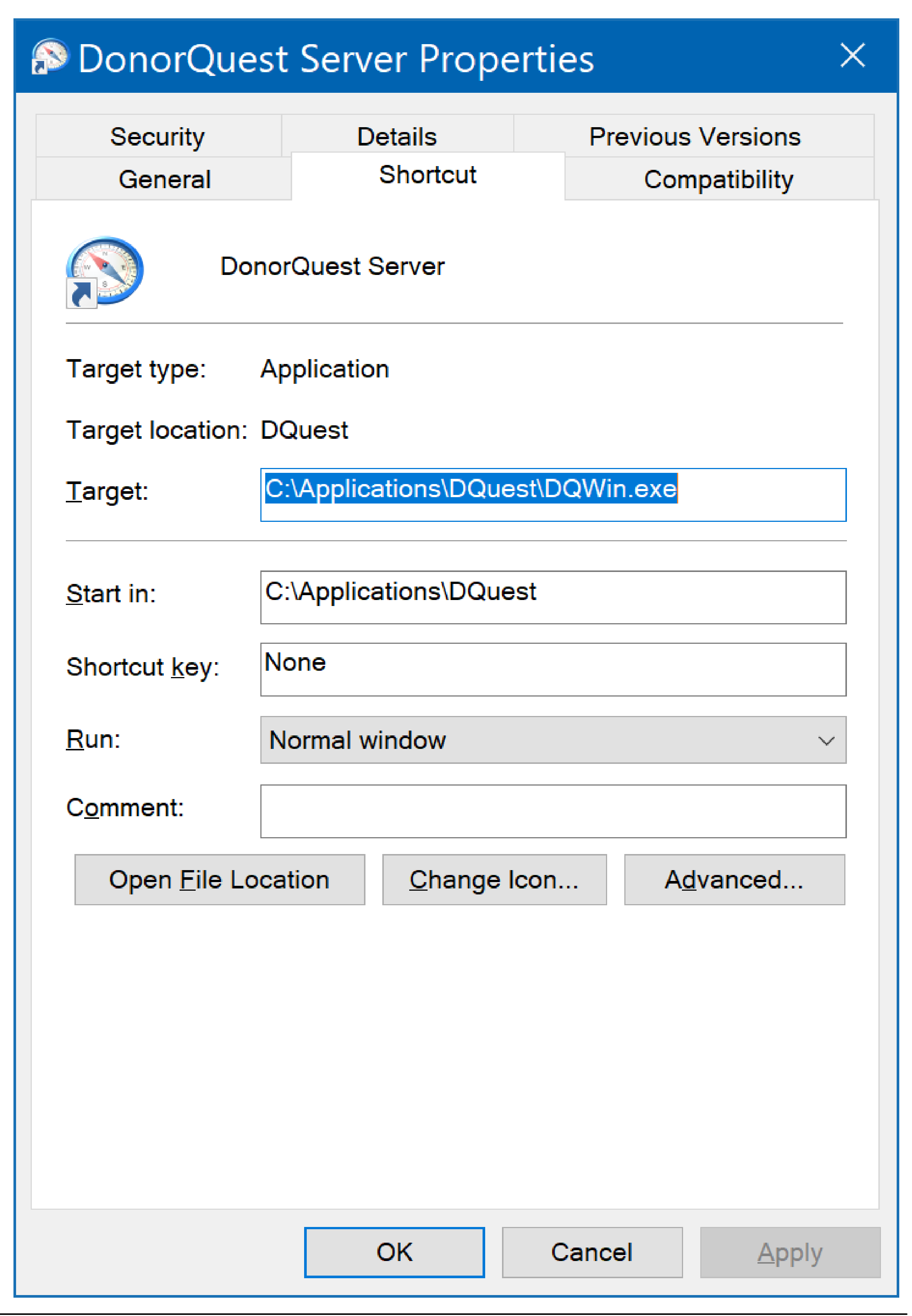
...will launch DonorQuest across the network share on a server named WinServer, in the shared folder \Applications\DQuest\ You may create the DonorQuest shortcut on a new workstation by first opening the Windows Explorer on the workstation and navigating to the shared DonorQuest folder located on your file server. There you should highlight the DQWin.exe file, do a right-mouse-click, and choose Send To, Desktop (create shortcut). That's it!

4.1.1 Enabling The Server Component

The DonorQuest Server Component

This topic is also for network administrators. The DonorQuest server component allows DonorQuest to run in client/server mode. This mode will only be of benefit to you if you are running DonorQuest across a network, have a large database (over 60,000 donors) and you would like to improve the performance of DonorQuest queries (selections) and reporting. In this mode, all selections and other data-intensive operations are performed on the server instead of the workstations, so that selections can run in seconds instead of minutes.

The server component is actually part of the main DQWin.exe application file. All you have to do is launch it on the server itself and pass it a -s parameter. You should create a desktop icon directly on the server for this purpose with these parameters:


DonorQuest Server Properties
Security
Details
Previous Versions
General
Shortcut
Compatibility
DonorQuest Server
Target type: Application
Target location: DQuest
Target: C:\Applications\DQuest\DQWin.exe
Start in: C:\Applications\DQuest
Shortcut key: None
Run: Normal window
Comment:
Open File Location
Change Icon...
Advanced...
OK
Cancel
Apply

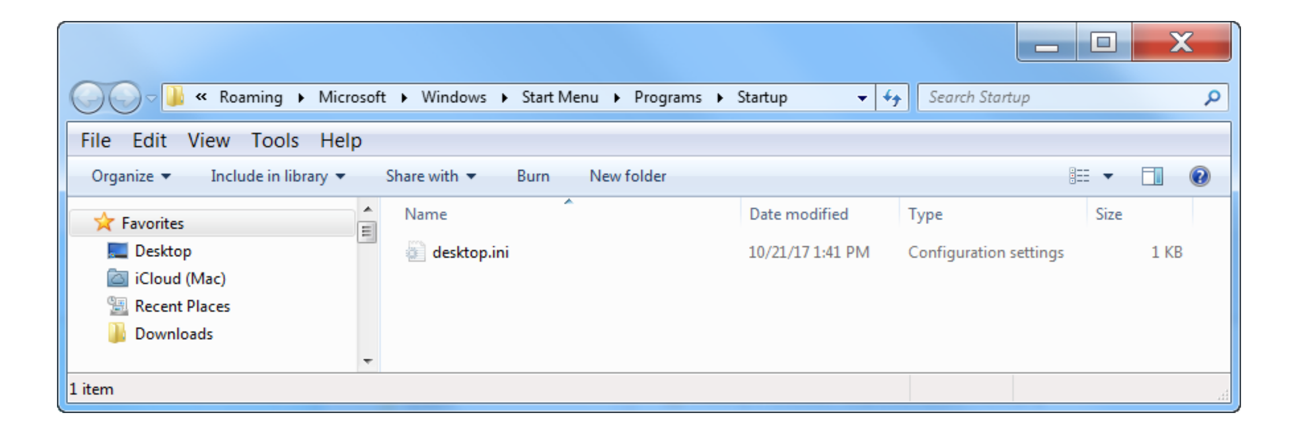
Note that this must be on the server itself, not a workstation. The \DQuest\ folder will likely be located within an application folder on your server, so make adjustments to the "Target" and "Start In" examples shown above as needed. When you launch DonorQuest on the server with this icon, DonorQuest will start in server mode, and will run continuously on the actual physical server, listening for requests from instances of DonorQuest running in client mode on the workstations. So you will need a server account that does not auto log off and allows DonorQuest to run continuously on the server.

For Auto-Start Of DonorQuest Server On A Peer-To-Peer Network

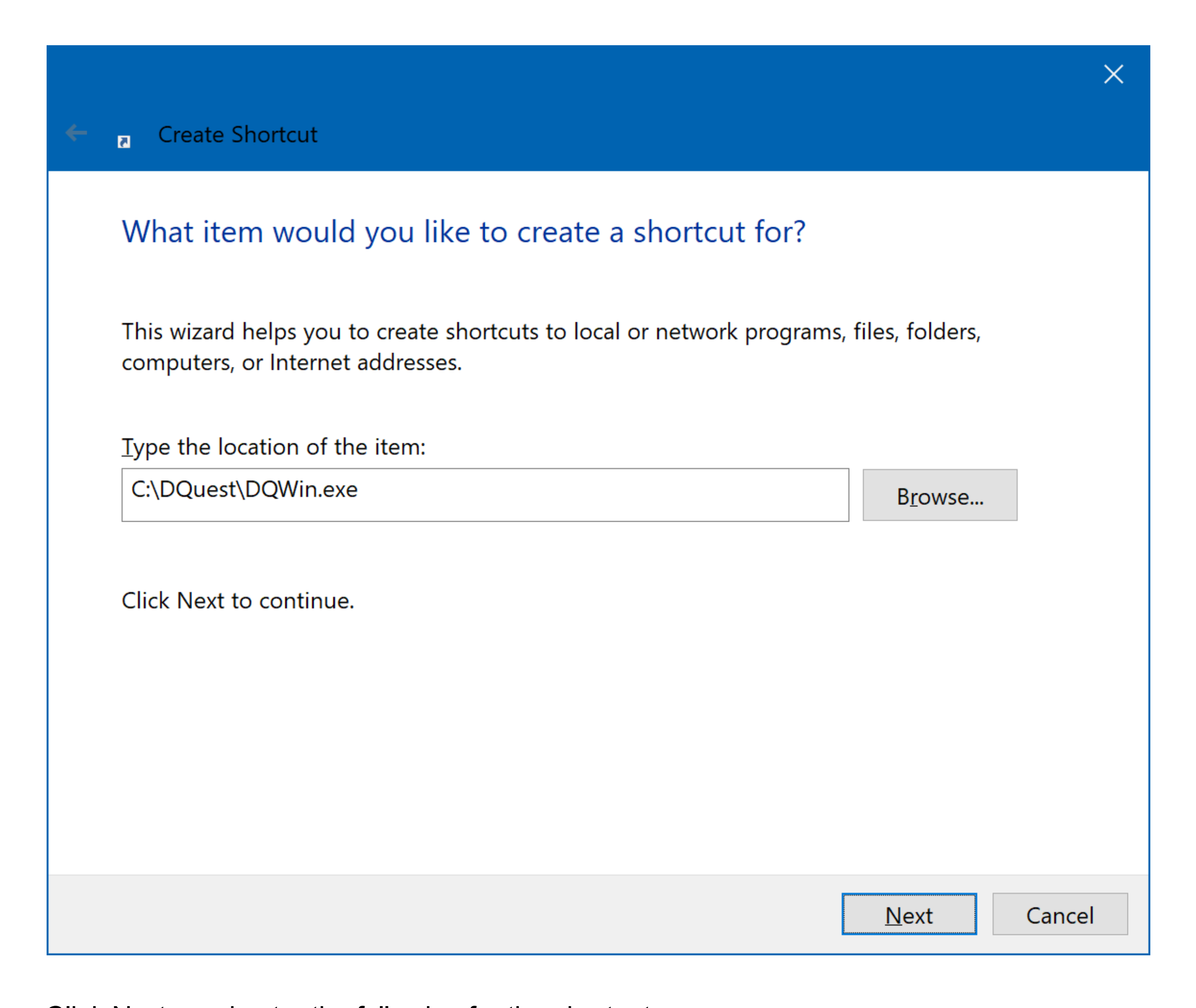
Click on Start, Run, and type

shell:startup

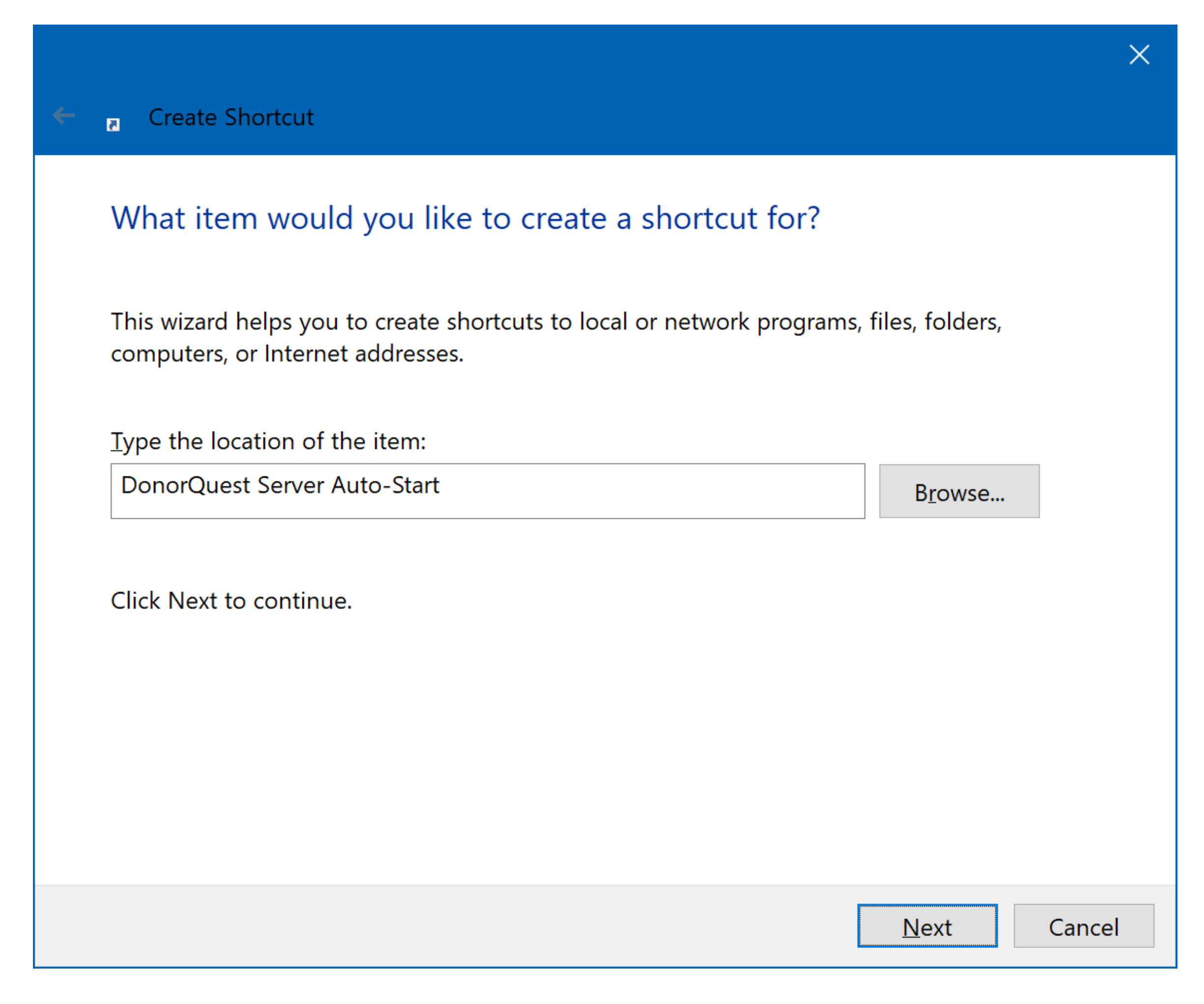
Press Enter. You should then see the StartUp folder for your computer appear which will looks like this:



Do a right-mouse-click and select New, Shortcut. The "Create Shortcut" dialog will appear. Click the Browse button and navigate to the installation folder for DonorQuest (normally c:\Applications\DQuest\) and double-click the DQWin.exe file. Click in the edit box for Type the location of the item, and add a single space and -s to what is there. It should look like this:



Click Next> and enter the following for the shortcut name:



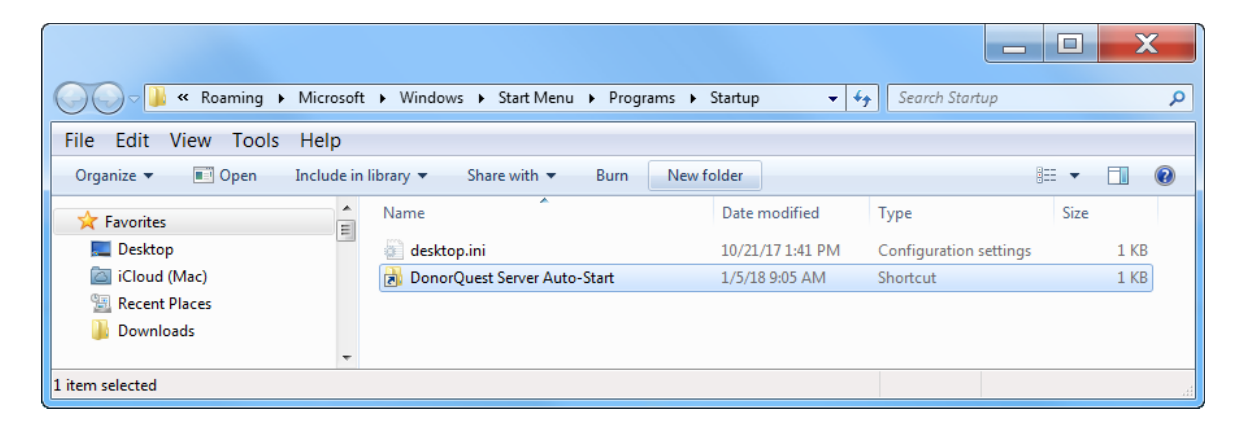
Click Finish. That's it. The next time you restart your computer, the DonorQuest server should start automatically. You can keep it minimized, but do not close it. It is needed by other workstations to run DonorQuest selections in client/server mode.

To Verify Auto-Start Of DonorQuest Server Is Enabled On A Peer-To-Peer Network

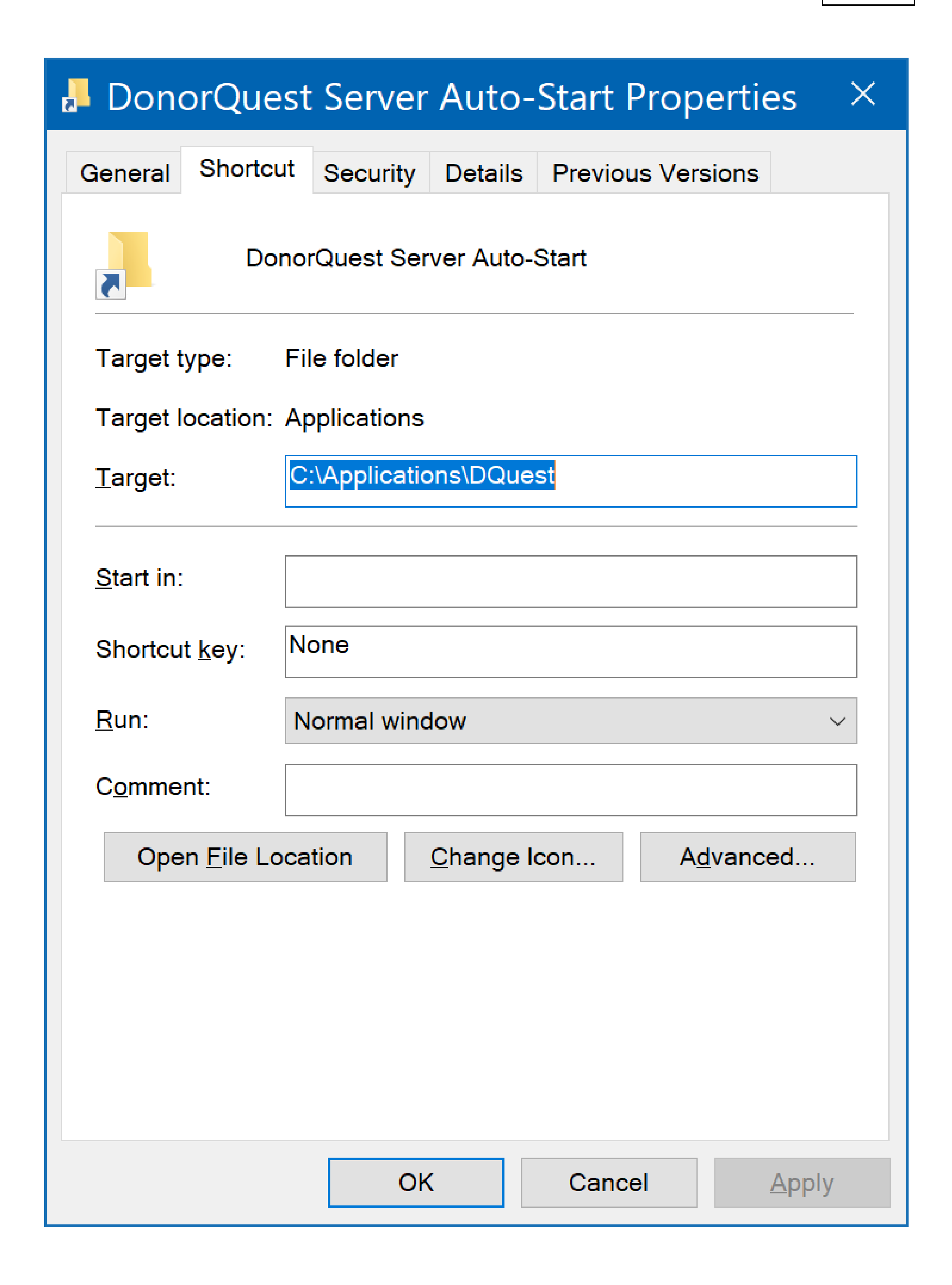
...you should then see an Explorer window. Look for an entry with DQWin in it. Do a right-mouse-click on that and select properties. Verify that you have the following:

Click on Start, Run, and type

shell:startup
Press Enter. You should then see the StartUp folder for your computer appear which will looks like this:



There should be an entry for DQWin. Do a right-mouse-click on it and select Properties. You should see:


DonorQuest Server Auto-Start Properties
General
Shortcut
Security
Details
Previous Versions
DonorQuest Server Auto-Start
Target type: File folder
Target location: Applications
Target: C:\Applications\DQuest
Start in:
Shortcut key: None
Run: Normal window
Comment:
Open File Location
Change Icon...
Advanced...
OK
Cancel
Apply

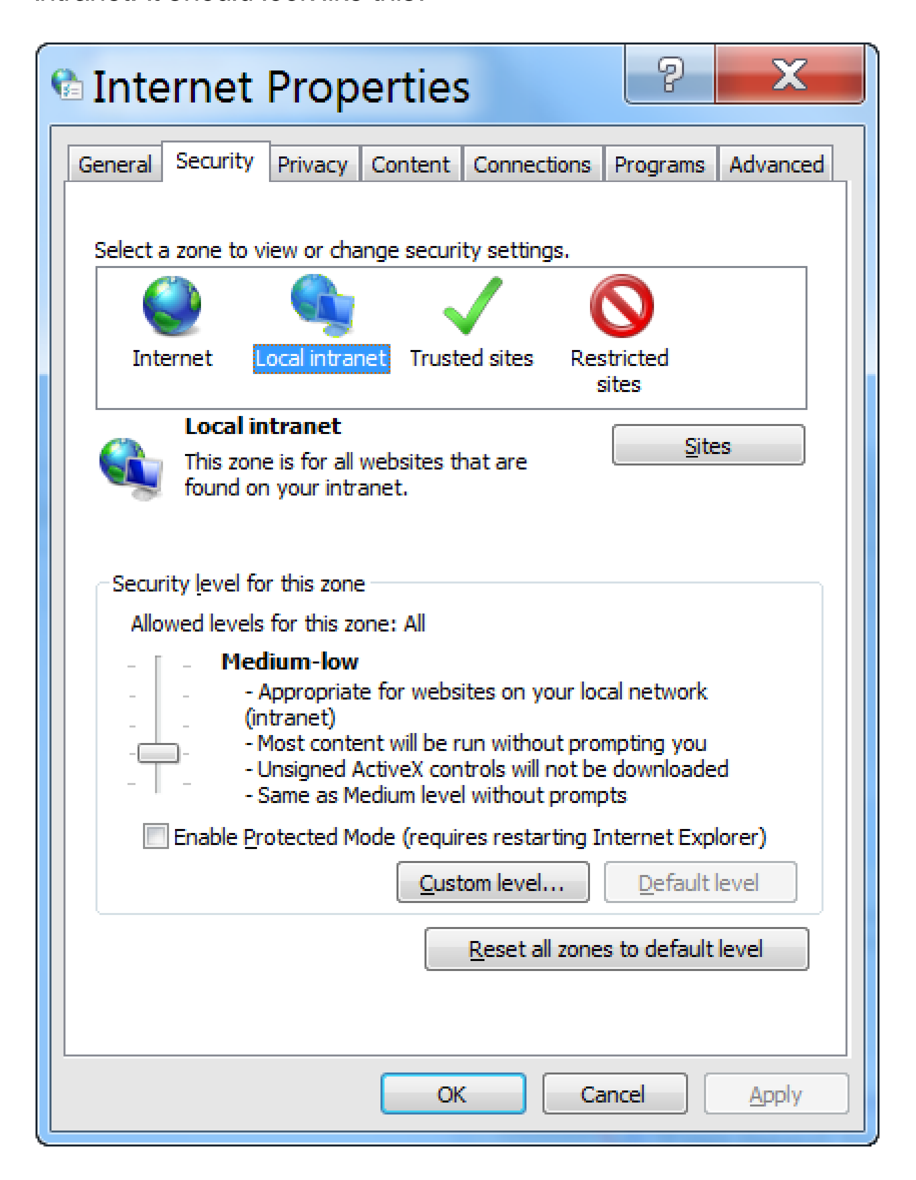
4.1.2 Disabling Open File - Security Warning

When launching DonorQuest across a network share, you may see a Windows message asking you to confirm that you want to run the application. This message is appropriate for files you are opening across the Internet, but when opening a file from a trusted source such as your in-house file server, this warning is not only inappropriate, it can be downright annoying since it will appear every time you launch DonorQuest. To prevent this message from appearing every time you launch DonorQuest, all you have to do is tell Windows that your organization's file server is a trusted source. You can do this as follows:

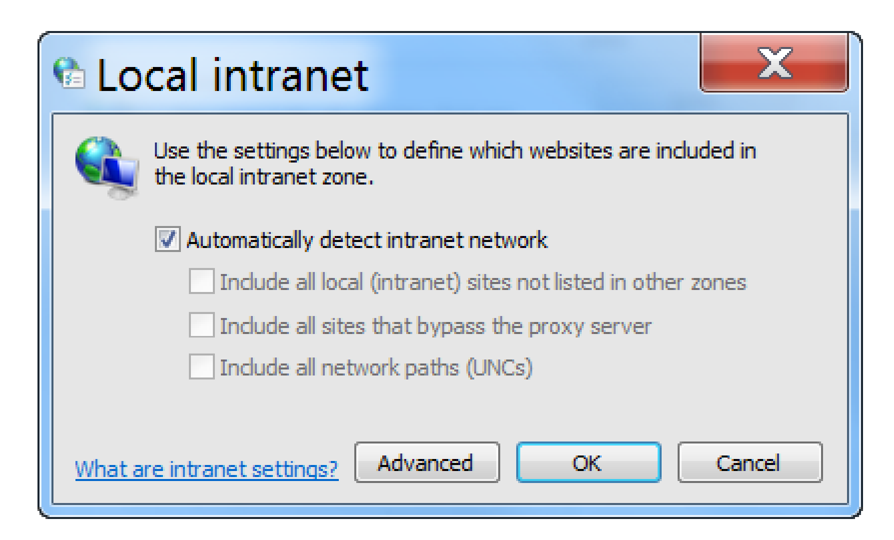
1) Click on Start, Run, and enter: inetcpl.cpl

2) Click Ok (if your are running Windows 7, type this in the Search)

3) You will see the Internet Properties dialog appear. Click on the Security tab, then Local Intranet. It should look like this:



4) Click on the Sites Button. You should see:



5) Finally click on the Advanced, and enter the name of your server like this:



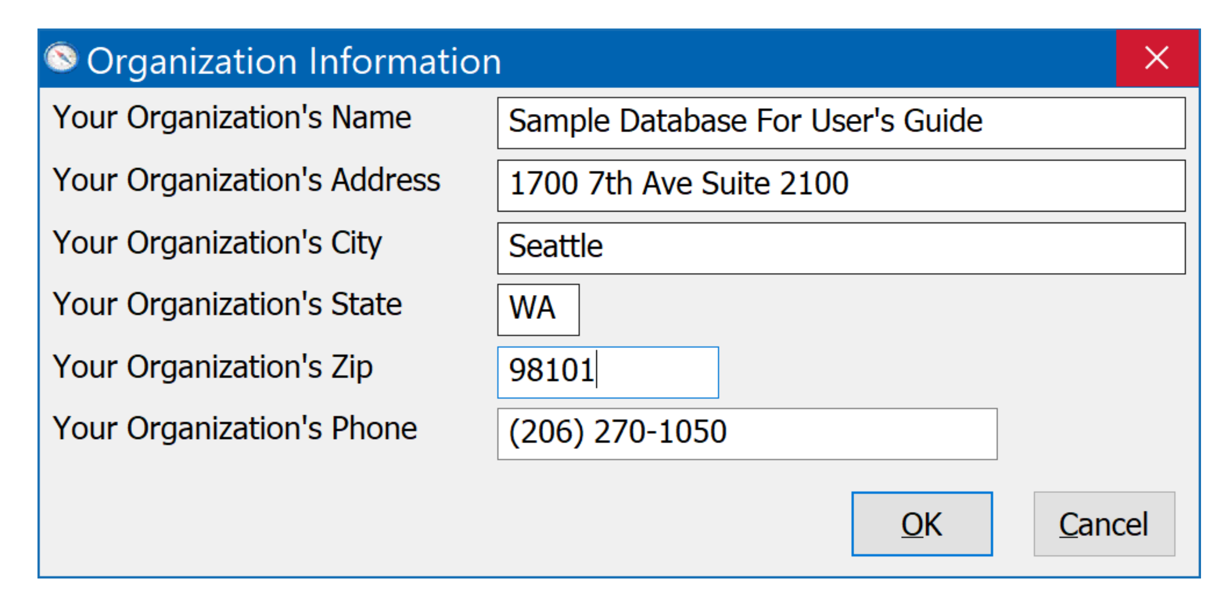
The example above uses a server name of "WindowsServer", but yours will be different. Once Windows has accepted the server name you typed, you may close all of the open dialogs. That should do it - you should not see the open file security warning again for files opened on your in-house server, but the warning will remain for Internet files.

4.2 Your Organization Information

Configure, Your Organization's Information...

Your organization's basic information will automatically appear on the top of many reports, such as donation receipts. This information can be set up as follows.

Select Configure from the menu, then click on Your Organization's Information. The following dialog will appear:



Simply type in your organization's information then click OK.

Your organization name will now appear in the title bar of DonorQuest. To have your organization's name appear in the title for all standard DonorQuest reports which use headings, click on Configure, Program Settings and turn on the checkbox for, "Include Organization Name On Reports."

4.3 User Account Setup

User, Setup User Accounts

If you are the system administrator for DonorQuest, you should setup a separate user account for each person who will need access. This will allow each person to log into DonorQuest using their name, and it will also allow DonorQuest to track the entries and activities of each user. It will also allow you to optionally limit just how much each user can do in DonorQuest based on the access rights they have been granted. User accounts provide multiple levels of security through the use of passwords and access rights. There should be a user account for each person who will be using DonorQuest. There are 52 pre-defined rights available for assignment to users, which govern different processes in DonorQuest. For example, a particular user may be given the right to add new donations, but not to view sensitive information about contributors -- such as their donation histories.

User Accounts are a very important aspect of DonorQuest, since this capability provides the following key benefits:

Data Security

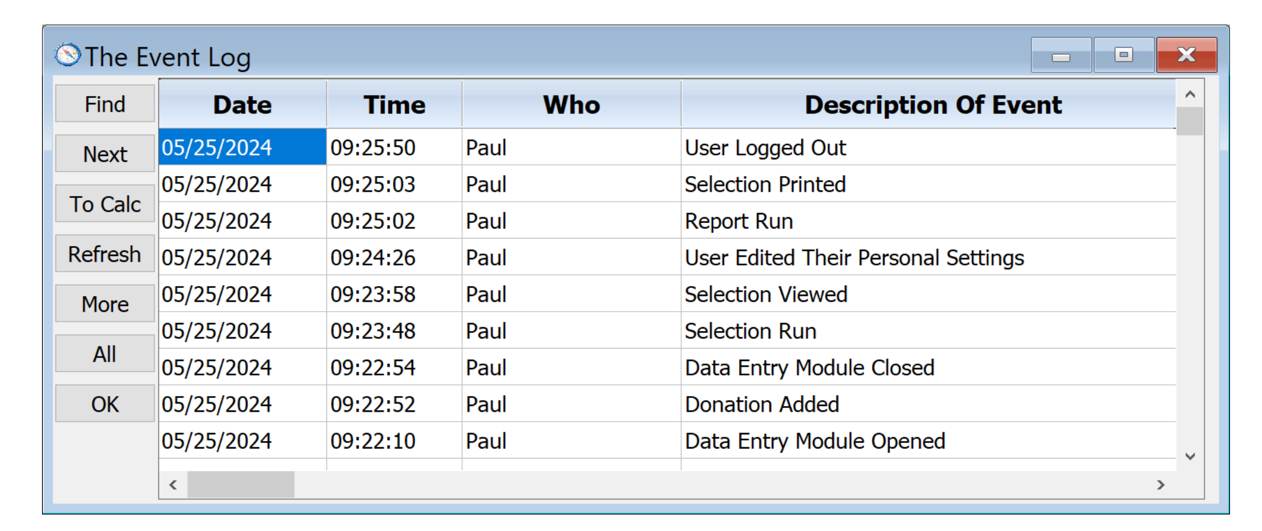
Only those people who are authorized to use DonorQuest may gain access to the system. For those granted access, you may limit how much of each donor's information they may see, and of that what they may change.

Multilevel Access

When a user account is set up, the user may be given some or all of a broad range of rights within DonorQuest. Certain users may be allowed more rights than others, depending on what level of access they need. For example, people assigned to enter incoming donations should be allowed to look up existing donor accounts in order to verify identity and add new donations, but they may be restricted from viewing or altering the existing donation histories of donor accounts.

User Accountability

Since DonorQuest asks users to log in each time they use the program, DonorQuest always knows who is using it. Because of this, DonorQuest is able to keep a running log of important events and is able to associate events with the users who created them. The Event Log keeps track of every process that takes place within DonorQuest. You can access the Event Log by selecting File, Open, The Event Log. Here is what the Event Log dialog looks like:



For example, when a user deletes a donor account a note will be made in the DonorQuest event log listing the ID number and name of the deleted donor and the name of the user who performed the deletion. Likewise if any aspect of a donor's account is altered (such as a name/address change or a change to one of the donor's donations), an entry will be

made in the Event Log. The name of a user is also used in other areas of DonorQuest to track things such as who created a specific Selection Result.

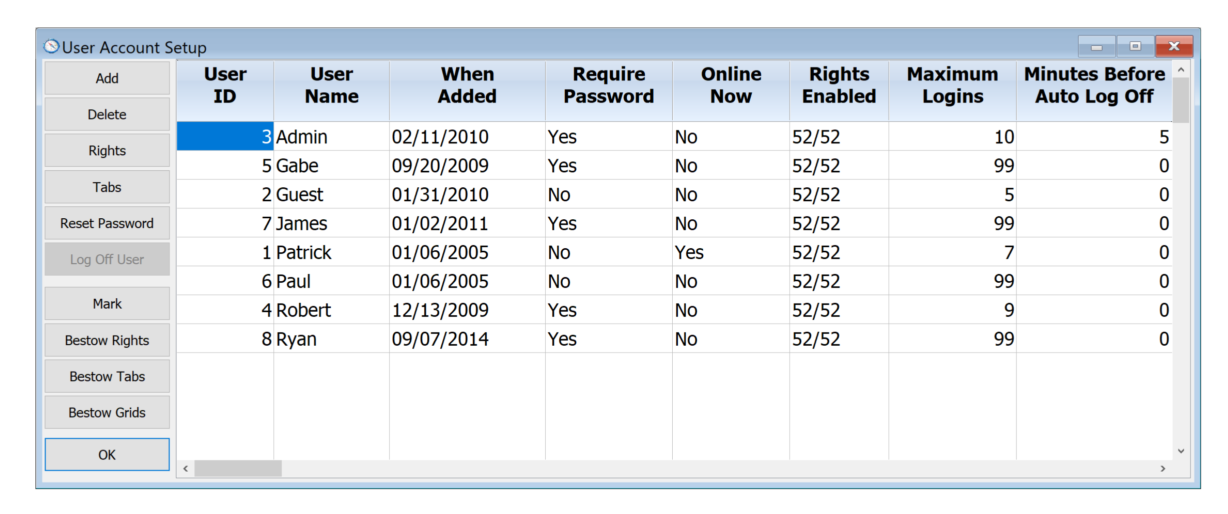
Special Note: Whether your organization is using the single or multi-user version of DonorQuest, user accounts should still be created for each person who will need access. The only difference between the single and multi-user versions of DonorQuest is that the multi-user version allows more than one person to be using the software at the same time. Otherwise the two versions are identical in all the features they offer.

4.3.1 Adding and Deleting User Accounts

User, Setup User Accounts

If you are the system administrator for DonorQuest and this is your first time accessing the program, you may use the Guest account to gain full access. You should immediately add a user account for yourself with full access enabled, then delete the guest account, or at least disable most of the rights for it (in particular the highest right which gives the ability to add and delete user accounts). If anyone else in your organization should have administrator rights to DonorQuest, you should also setup a new account for them at this time. Occasionally when users contact us for support, we will need them to have administrative rights to DonorQuest. So if your availability is limited, it is good to have a second person in your organization who also has administrator access to DonorQuest.

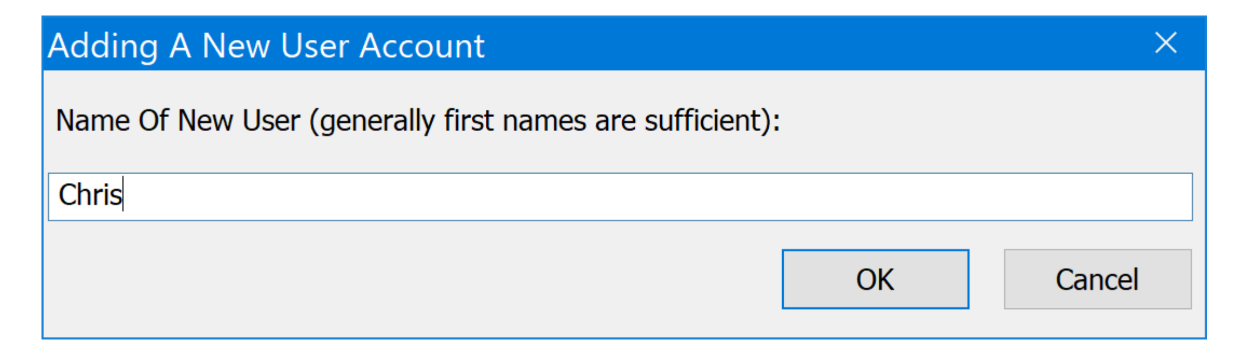
To create, delete, or modify a user account, click on User, Setup User Accounts. This will open the User Account Setup dialog, shown here:



User ID	User Name	When Added	Require Password	Online Now	Rights Enabled	Maximum Logins	Minutes Before Auto Log Off
3	Admin	02/11/2010	Yes	No	52/52	10	5
5	Gabe	09/20/2009	Yes	No	52/52	99	0
2	Guest	01/31/2010	No	No	52/52	5	0
7	James	01/02/2011	Yes	No	52/52	99	0
1	Patrick	01/06/2005	No	Yes	52/52	7	0
6	Paul	01/06/2005	No	No	52/52	99	0
4	Robert	12/13/2009	Yes	No	52/52	9	0
8	Ryan	09/07/2014	Yes	No	52/52	99	0

Adding A New User Account

To add a new user, simply click the Add button, shown above. This will open the Adding A New User Account dialog shown here:



Type in the new user's user name. Typically a person's first name followed by the first letter of their last name is sufficient. This will immediately add the new user account with default settings. You should now configure the new user account based on what the user's needs are. In particular you should click the Rights button with the user's name highlighted, and turn off any of the advanced rights they do not need. Rights are in order of increasing importance, with the ability to create and delete user accounts being the most important right.

To delete an existing user account, first highlight the name of the existing account, then click the Delete button. You will be prompted for final confirmation before a user account is deleted. Note that deleting a user account will only remove a user's ability to login. All the things they have ever done in DonorQuest will still have their name attached. For example, every donation they have ever added will still show their user name as the person who added the donation, and the Event Log will still have their name associated with everything they are responsible for doing.

Following is a description of the configurable attributes for each user account. To edit an attribute for a given user, double-click on it:

User Name

Name of user. This is the name the user will enter when logging into DonorQuest. It is also the name used to track the activities of each user.

When Added

This is the date the user account was created. This column is automatically set by DonorQuest and cannot be changed.

Require Password

Turn this setting on if the user is to be required to enter a password whenever they log in. The use of passwords is strongly encouraged, especially in very large organizations. If a user is not required to have a password, then entering their user name is all that's required for gaining access to the system during login.

Online Now

Shows whether the user is currently using DonorQuest. This is an informational column and can not be edited.

Rights Enabled

Shows how many of the 52 available rights are currently enabled for the user. If you are an administrator and would like to increase or decrease the rights enabled for a user, highlight their user name and click on the Rights button to the left.

Maximum Logins

This setting controls the maximum number of concurrent logins each user may have (not the maximum lifetime logins). The default setting is 99, which effectively means no limit. For security reasons, each user should limit their logins to one workstation at a time, but it is up to the system administrator to decide whether to enforce that practice.

Minutes Before Auto Log Off

Normally all users should log out of DonorQuest at the end of the day. This allows certain automated services (such as data backups) to run at night when no one is in the database. Also, if a user is away from their workstation for a while they should log out of DonorQuest so no one else will be able to perform operations at their workstation under their name. However, users typically forget to log off when they should. The auto log off feature will automatically log a user out of DonorQuest after a specified number of minutes of inactivity. This feature is particularly useful when users are accessing the database from home. It is often the case that such user will disconnect from the server hosting DonorQuest, but forget to log off DonorQuest first, in which case it keeps running on the server.

Prompt For Pledge Linkage

During entry of a new donation, the donation may be linked as a payment towards one if the donor's outstanding pledges. When adding a new donation with the Prompt For Pledge Linkage option checked, DonorQuest will automatically look for current outstanding pledges and prompt the user if any exist, asking of the donation may be a pledge payment. If the user responds Yes, DonorQuest will show a list of the donor's pledges and ask which one to apply the donation towards.

Remind Of Open Contacts

Turn on this setting if you want DonorQuest to remind the user when they have open (unresolved) contacts. With this setting on, the user will be shown a count of how many open contacts have come due for the current day, and how many open contacts there are from the past which you have not yet been resolved. The reminder will be shown each time the user logs into DonorQuest. When a notification is shown at login, the user will also be given the option of immediately viewing the contacts which need to be acted on.

Deleting An Existing User Account

To delete an existing user account, simply highlight the name of the user account you wish to delete and then click the Delete button, shown above in the User Account Setup dialog. Note that this will simply prevent the user from logging in, but everything they have done (all past entries) will still have their user name attached.

Tabs Enabled

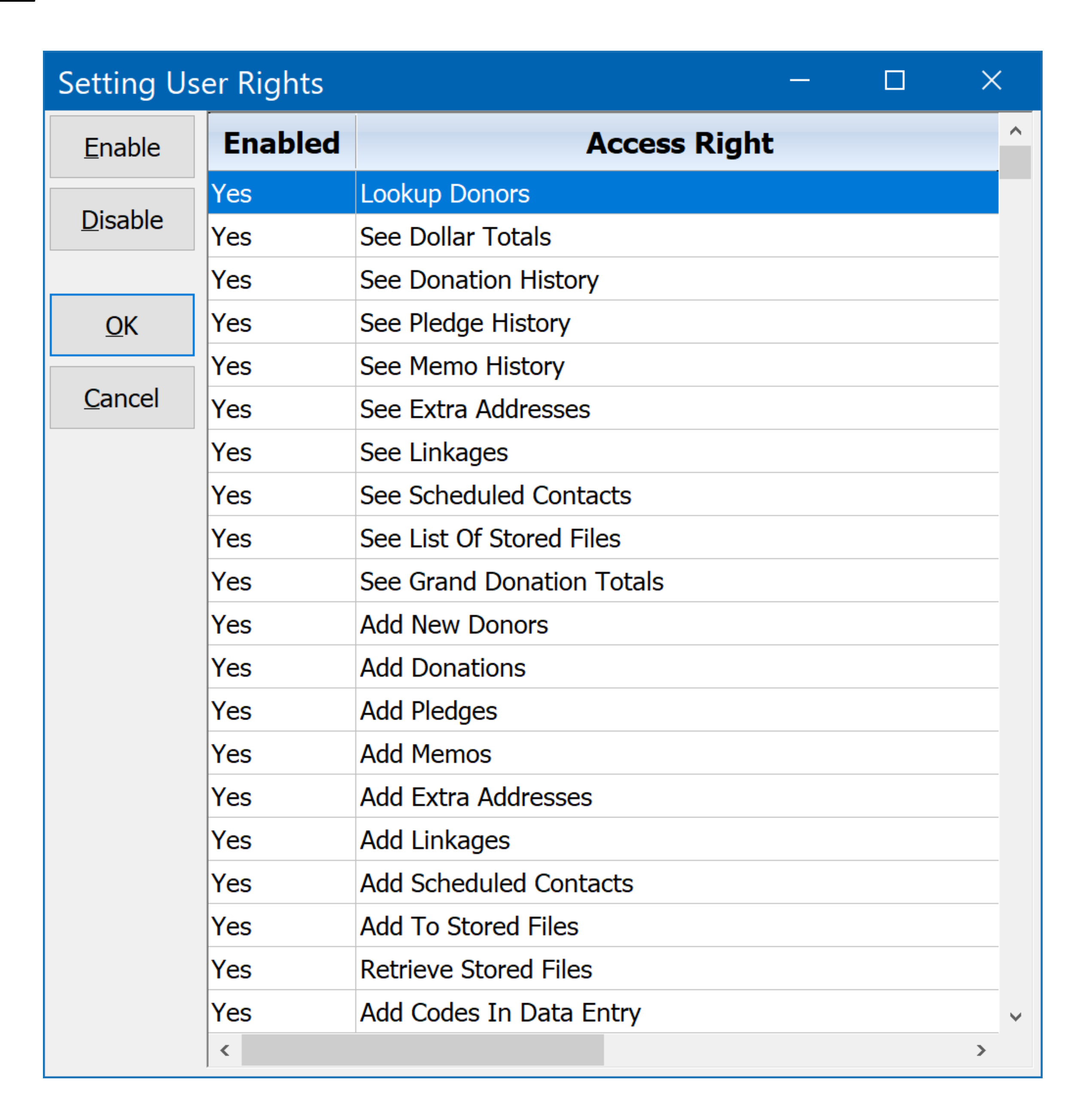
The tabs on the Main Information edit dialog which a user is allowed access to. If no tab names are shown here, then the user has access to all tabs by default. To limit the user to specific tabs, click on the Tabs button shown on the left.

Resetting A User's Password

If a user forgets their password, you may highlight their user name and click the Reset Password button in the User Account Setup window to have DonorQuest forget their current password. The user will be asked to establish a new password the next time they login. Note that you should only do this if a user plans to immediately login and establish a new password, as their account will not be password protected until they login and establish a new password.

4.3.1.1 Changing A User's Rights

When editing user accounts, you may turn on or off specific rights for a given user. Clicking on the Rights button in the User Account Setup Window will open the Setting User Rights window, as shown below. To enable or disable a specific right within the rights window, simply highlight the particular right and click the Enable or Disable button.



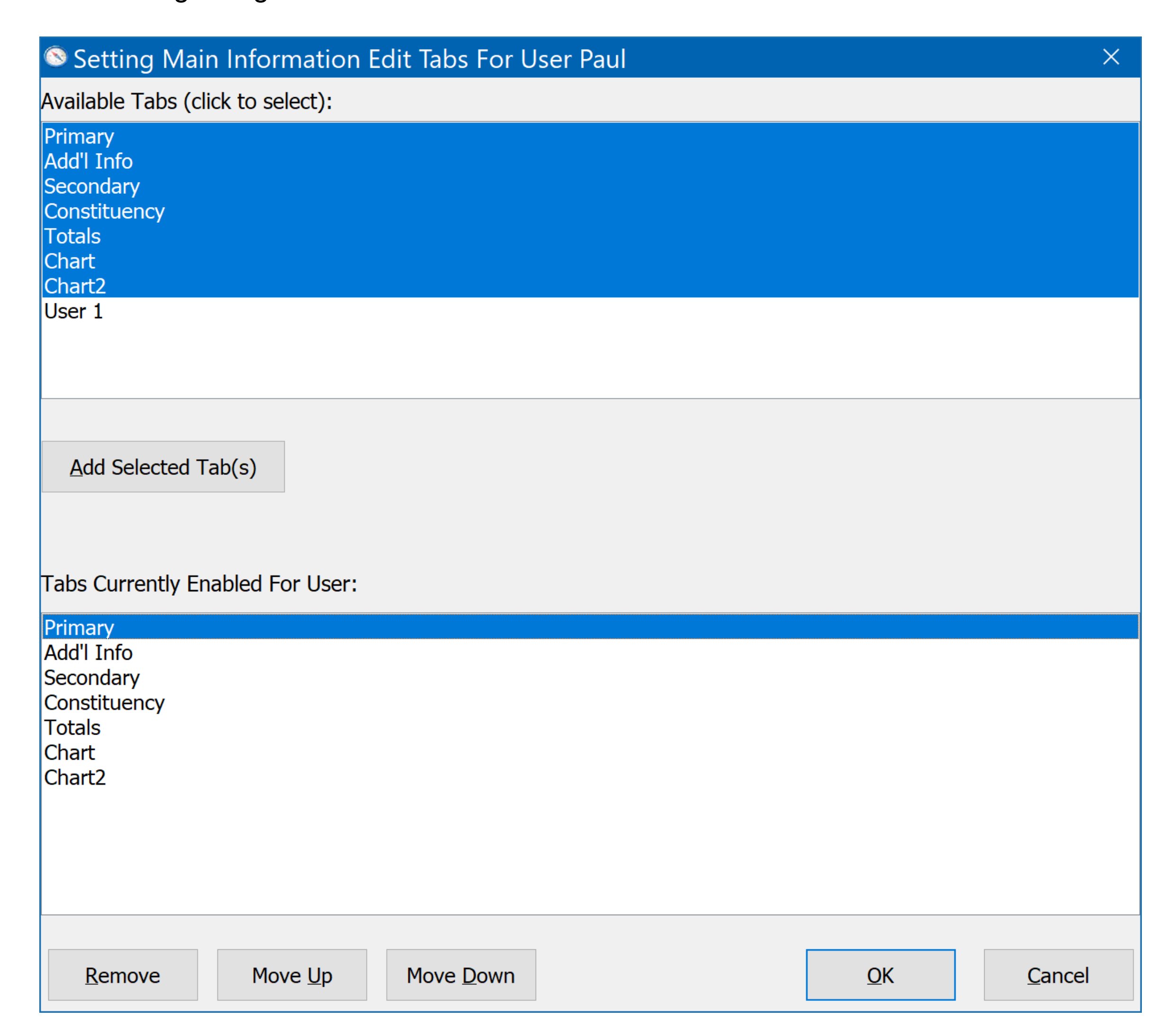
Bestowing Rights

Sometimes you will be adding a new user (or group of users) who you wish to have the same rights as an existing user. Rather than enabling and disabling the same rights for each new user one right at a time, you may use the Mark button to mark all of the user accounts you wish to have uniform rights, then position the highlight on the existing user account you want to use as the rights model for all of the accounts you have marked. Then, clicking on the Bestow Rights button will apply a uniform set of rights to all marked accounts based on the model account.

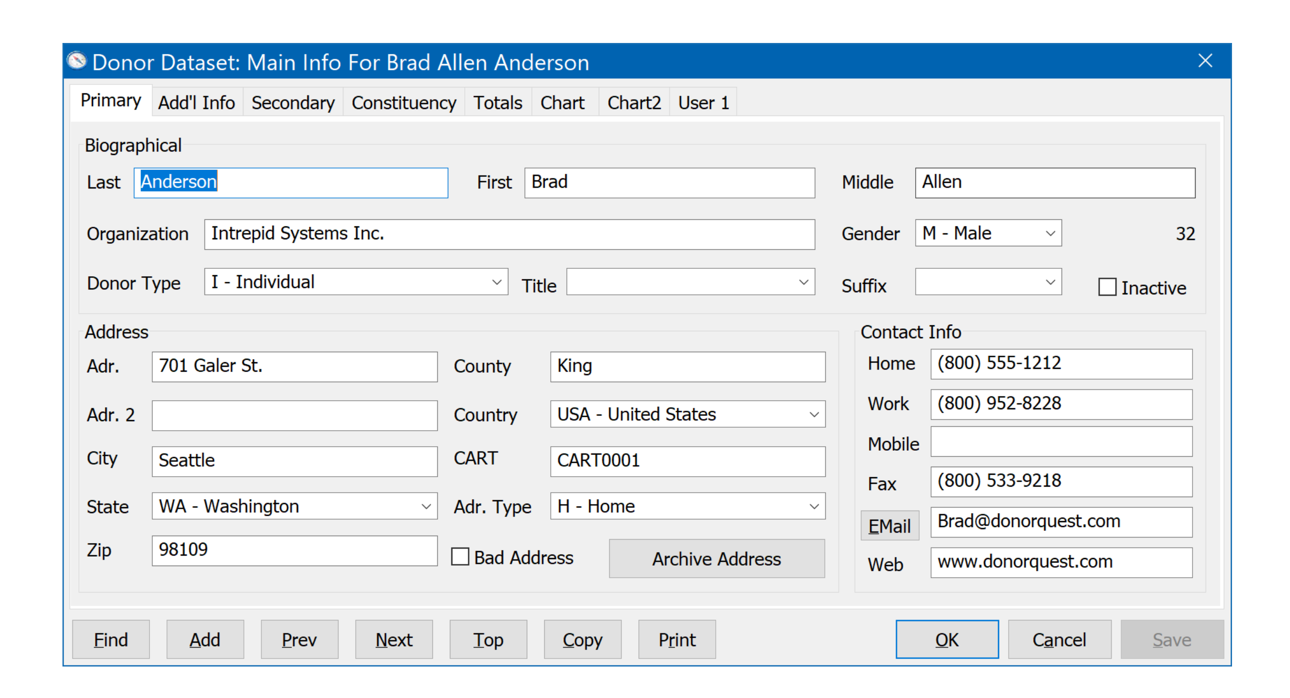
4.3.1.2 Controlling Tab Access

You may limit which Main Information Edit tabs a user has access to by highlighting their name in the User Account Setup window and clicking the Tabs button. Doing so will open

the following dialog:



The upper half of the dialog shows the available tabs (including any user-defined tabs), and the lower half shows the tabs currently enabled for the user. You may highlight (or unhighlight) any of the available tabs in the upper window by single-clicking on them, then click the Add Selected Tab(s) button to enable them for the user. To remove access to a tab for the user, single-click the tab name in the lower window to highlight it, then click the Remove button. The Move Up and Move Down buttons allow you to control the order in which the tabs will appear to the user in the Main Information Dialog. The top-to-bottom order of the tabs here corresponds to the left-to-right order of the tabs in the Main Information Dialog. For example, the enabled tabs shown above would result in the Main Information Dialog looking like this:



Bestowing Tabs

Sometimes you will be adding a new user (or group of users) who you wish to have access to the same tabs as an existing user. Rather than manually selecting the tabs for each new user account, you may use the Mark button of the User Account Setup dialog to mark all of the user accounts you wish to have uniform tab access, then position the highlight on an existing account you want to use as the tab model for all of the accounts you have marked. Then, clicking on the Bestow Tabs button will apply the same tab access to all marked accounts based on the model account.

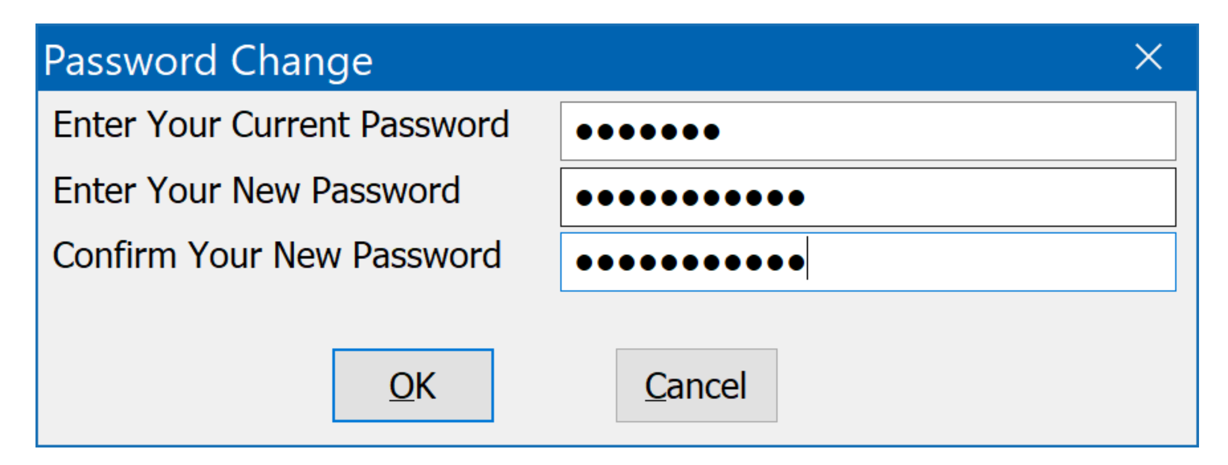
4.3.2 Changing Your Password

As a user of DonorQuest, you have one fundamental right that no one but you can control - your password. Only you should know what it is and only you can change it. No one else (not even the system administrator) is able to find out what your password is. Because of this, your password is your guarantee that what occurs within DonorQuest under your user name is only done by you and not somebody simply logged in as you.

Each user, no matter how infrequently they may use DonorQuest, should have their own account - including temporary workers and volunteers. Do not have multiple users login using the same account name. The number of user accounts permitted in DonorQuest is unlimited, so there's no reason a user should ever have to share their account name and password with anyone else.

In a large organization, it is a good security measure to change your password on a regular basis, such as every six months or so. This way, if someone else were to have somehow learned your password, they would not have an ongoing ability to log in as you. To change your password:

Select User from the menu, then click Change Your Password.
Type your current password, then your new password twice like this:



Once you have changed your password, it will take effect immediately. You must use your new password when logging in again. If you forget your password, there is no way the system administrator can get it back for you. An administrator could however reset the password for your account so that you could establish a new password the next time you login.

4.3.3 Viewing Your Access Rights

User, Show Your Access Rights

As discussed earlier, each user may be given different rights within DonorQuest. For example, a particular user may be given the right to add new donations, but not to view sensitive information about contributors, such as their donation histories. If you wish to know the rights granted to your account, you may find out by selecting User, then click Show Your Access Rights. This will open the user access rights window, as shown below.

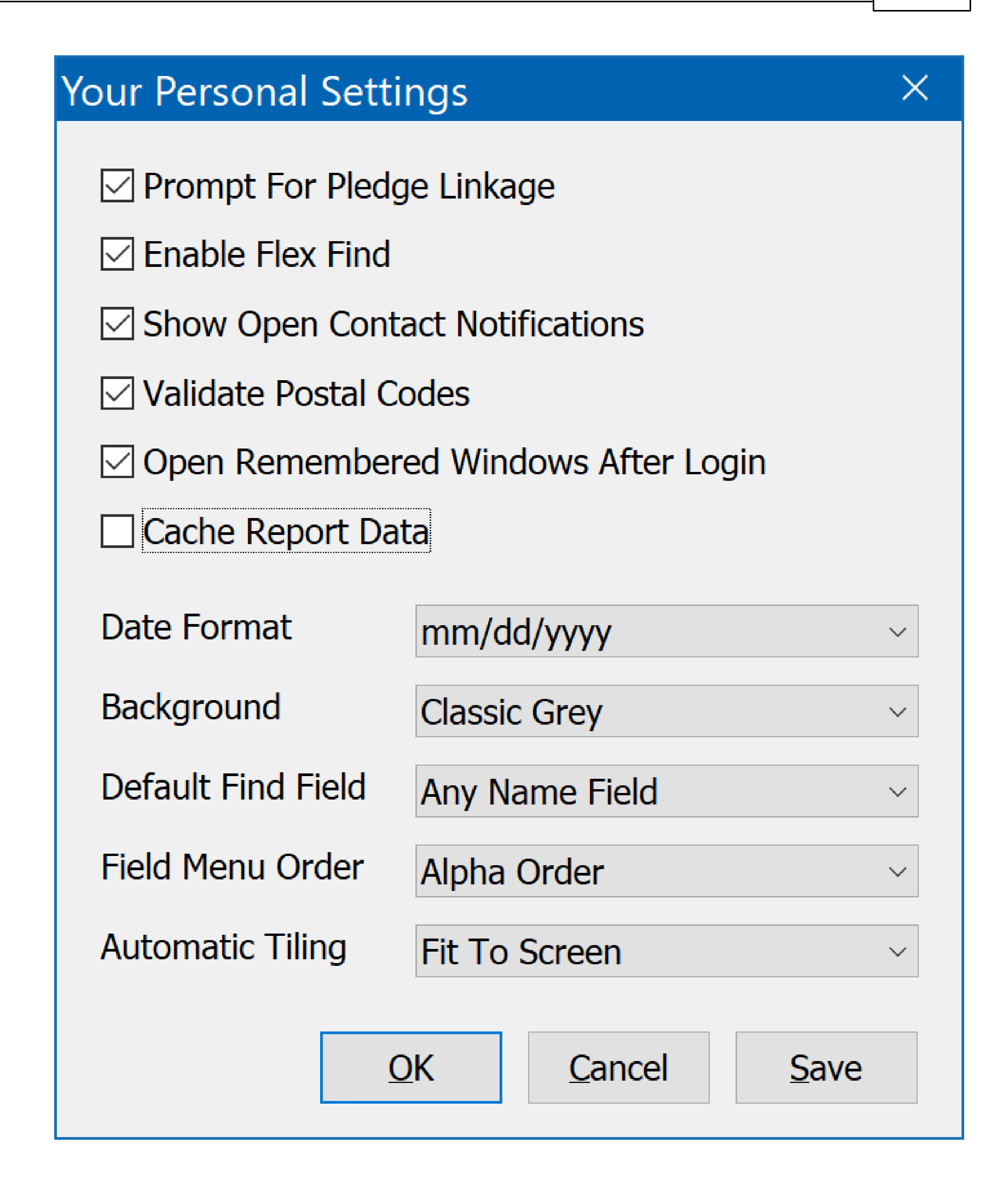


In all there are 52 rights within DonorQuest. Your particular account may have been set up with one or all of them. The 52nd right is the most important one, since it gives you system administrator privileges. Only system administrators are able to add and delete other user accounts.

4.3.4 Changing Your Personal Settings

User, Change Your Personal Settings

Personal Settings in DonorQuest are preference settings which affect only your user account. To access the personal settings in DonorQuest, click on User, Change Your Personal Settings. You will then see the following dialog:



Prompt For Pledge Linkage

During entry of a new donation, the donation may be linked as a payment towards one of the donor's outstanding pledges. When adding a new donation with the Prompt For Pledge Linkage option checked, DonorQuest will automatically look for current outstanding pledges and prompt you, asking if the donation may be a pledge payment. If you respond

Yes, DonorQuest will show a list of the donor's pledges and ask which one to apply the donation towards. DonorQuest will also copy the Donation Type, Account, Stimulus, Fund, and Appeal codes from the pledge to the donation, so you can just leave those fields blank in the donation and they will be auto-populated for you (provided they were entered into the corresponding pledge fields). While not standard practice, it is possible to use different codes in the donation. To do this, fill in the donation codes before linking to the pledge. DonorQuest will then honor your code preferences in the donation - with one exception. The Donation Type and Pledge Type must both be either monetary, or of the same Alternate Unit Type.

Enable Flex Find

Turn this setting on if you wish the Flex Find search box to be available to you when the Main Information window is open. Flex Find is an incredibly versatile way of searching for constituents, so you really should keep this option enabled.

Show Open Contact Notifications

Turn on this setting if you want DonorQuest to remind you when you have open (unresolved) contacts upon login. With this setting on, each time you log onto DonorQuest you will be shown a count of how many open contacts have come due for the current day, and how many open contacts there are from the past which you have not yet been resolved. The same notification dialog will give you the option of immediately viewing your open contacts. Having this setting on will also display a continuously updated count of the number of open contacts you have for today in the upper-right corner of the contacts icon on the DonorQuest tool bar. If other users assign open contacts for today to you as you are working in DonorQuest, you will immediately see the contact counter increase, much like seeing an unread email counter on the main icon for your email software. At anytime you may click on the down-pointing arrow to the right of the contacts icon to see your contacts.

Validate Postal Codes

Whenever you edit the name/address information for a record, DonorQuest will automatically check to be sure the postal (zip) code is correct for the city and state you have entered. Further, if you simply enter a zip code and press the tab key, DonorQuest will automatically fill in the city, state, and county fields for you if they are currently blank. In most cases you will always want this validation and assistance. However, since the validation is based on United States zip codes, you may wish to turn off the validation if you are using DonorQuest outside of the United States, or you are entering a large number of International addresses.

Open Remembered Windows After Login

Turn on this setting if you would like DonorQuest to automatically open the Main Information windows immediately after you login. This is convenient if you mainly do data

entry in DonorQuest and typically want to get right to the data windows.

Cache Report Data

DonorQuest can store and maintain a copy of data needed for the most frequently used reports on your actual workstation so that the information is readily available. In most cases this will greatly speed reporting in DonorQuest when you are running it on a local area network and you have a fast computer but a slow network connection. However in rare cases when you have a slow computer but a super fast network, you may get better performance leaving this setting off. There is no harm in turning it on and off, so feel free to experiment. Since it is a personal setting, it has no effect on other users and their workstations.

Date Format

DonorQuest supports multiple date display formats. Changing this setting has absolutely no effect on how dates are actually stored in the database, it simply controls how they are shown to you in the various DonorQuest screen displays and on any report you may print.

Background

This setting simply controls the background color used for the main program window in DonorQuest. You can easily try the various color options by clicking the Save button on the Personal Settings dialog after selecting a different color from the drop-down list. This will allow the dialog Personal Settings dialog to remain open while effecting a color change.

Default Find Field

When using the Find feature of the Main Information window, you are able to search by multiple fields. Normally the entry cursor is positioned in the Any Name Field blank, but if you find that more often than not you are searching by another field such as Donor ID, you can use this personal setting to tell DonorQuest to automatically place the cursor in the ID field of the Find window each time you do a Find. Note that the newer Flex-Find feature is the preferred way of interactively searching for a specific constituent.

Field Menu Order

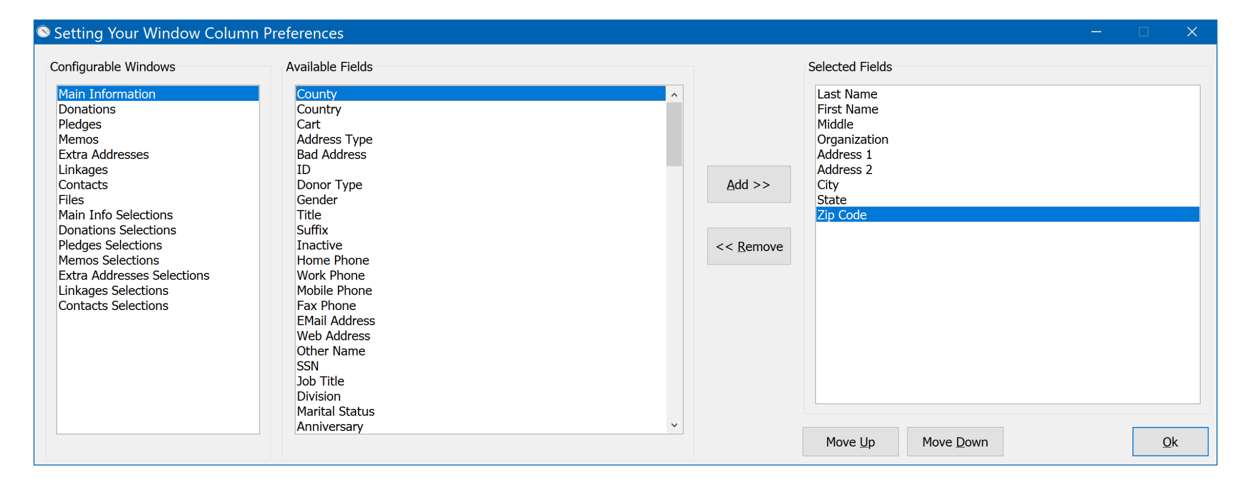
The Field Menu is used throughout DonorQuest. It is a menu of all the predefined fields which come with DonorQuest, as well as any custom fields you define. This menu may either be shown in alphabetical order for each table, or the order in which the fields occur on the data entry forms. DonorQuest will remember your field menu order preference between sessions, and you can change it at anytime.

Automatic Tiling

When routinely launching DonorQuest on different workstations, most users find it convenient to let DonorQuest automatically resize the various spreadsheet-style data windows to make optimal use of the available screen space, which can vary from workstation-to-workstation, depending on screen resolution. But you also have the option of DonorQuest always opening the windows positioned and sized exactly as you left them relative to the main DonorQuest program window. If this is your preference, then set the Automatic Tiling option to None. Otherwise, you will choose from one of the following tiling options - Main Window Priority, Maintain Window Heights, Fit To Screen, Horizontal, and Cascade. For a complete discussion of these options, please refer to the Window Menu topic.

4.3.5 Changing Your Window Column Preferences

It is possible to adjust column positions in the various spreadsheet-style windows in DonorQuest by clicking and holding down the left mouse button on a column heading and dragging left or right. You can also do a right-mouse-click on any column title and turn on or off the display of a column. This is fine for simple customizations, but making wholesale sweeping changes that way is cumbersome. But there's a way to easily change your window display preferences. When you click on User, Change Your Window Column Preferences, you will see the following:



The, "Configurable Windows" pane shows all of the windows in DonorQuest which allow customization. As you scroll through the window names, you will see the, "Available Fields" pane update to show all of the available fields (columns) for the currently highlighted window. The, "Selected Fields" pane shows the fields (columns) which will actually be displayed for the window when you use it. You can use the Add>> button to move Available Fields to Selected Fields. The <<Remove button will take the currently highlighted field in the Selected Fields pane and move it back to the Available Fields pane, effectively taking it off the actual display you will see for the corresponding window. The "Move Up" and "Move Down" buttons directly below the Select Fields pane will move the currently highlighted field up or down, corresponding to a left or right movement for the

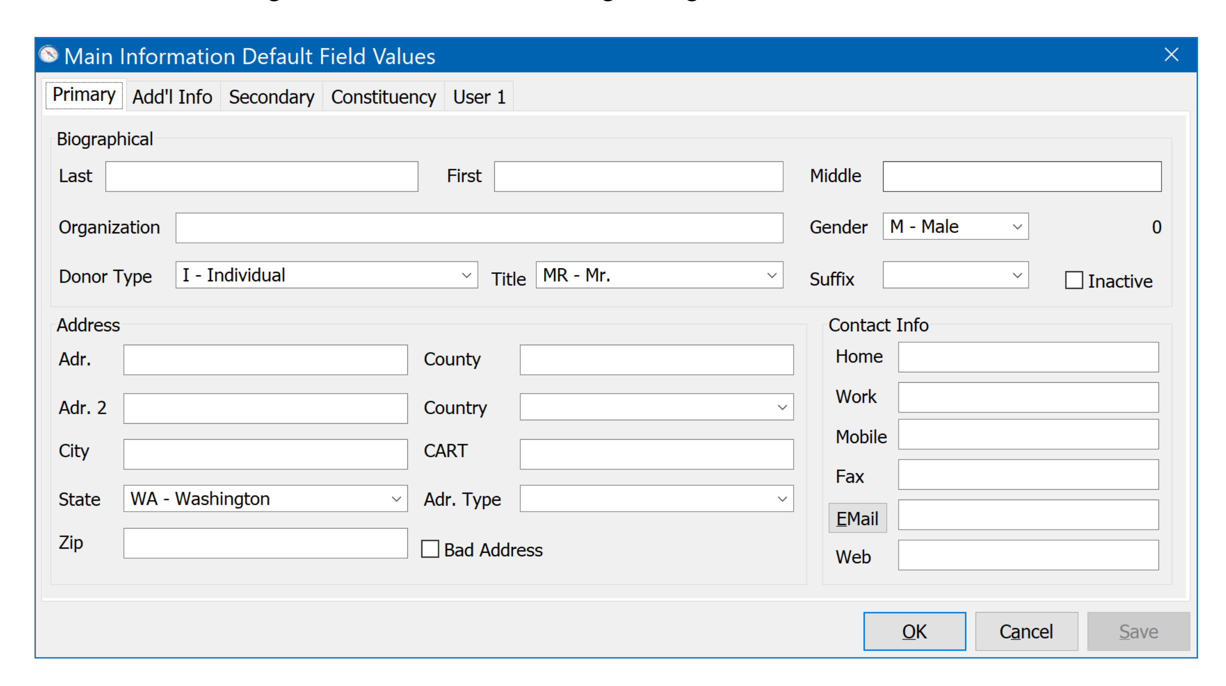
column which will show the field contents when you use the window. Any changes you make here are for your DonorQuest account only and do not affect other users. Changes are saved immediately, so you may simply click the OK button when you're done making changes.

4.4 Donor Default Field Values

Configure, Donation Default Field Values

The Donor Default Field values allow you to specify the default values to be automatically entered for you when you add a new donor. This feature reduces the amount of data entry necessary for each new donor. For example, if you are adding mostly individual donors, you can set the default Donor Type to be "I" for Individual. Main Information default field values are also user-specific. This means that you can set your own defaults without interfering with the defaults selected by other users. Your defaults will remain in effect until you change them.

To access your donor default field values, click on Configure, Main Information Default Field Values. Doing so will show the following dialog:



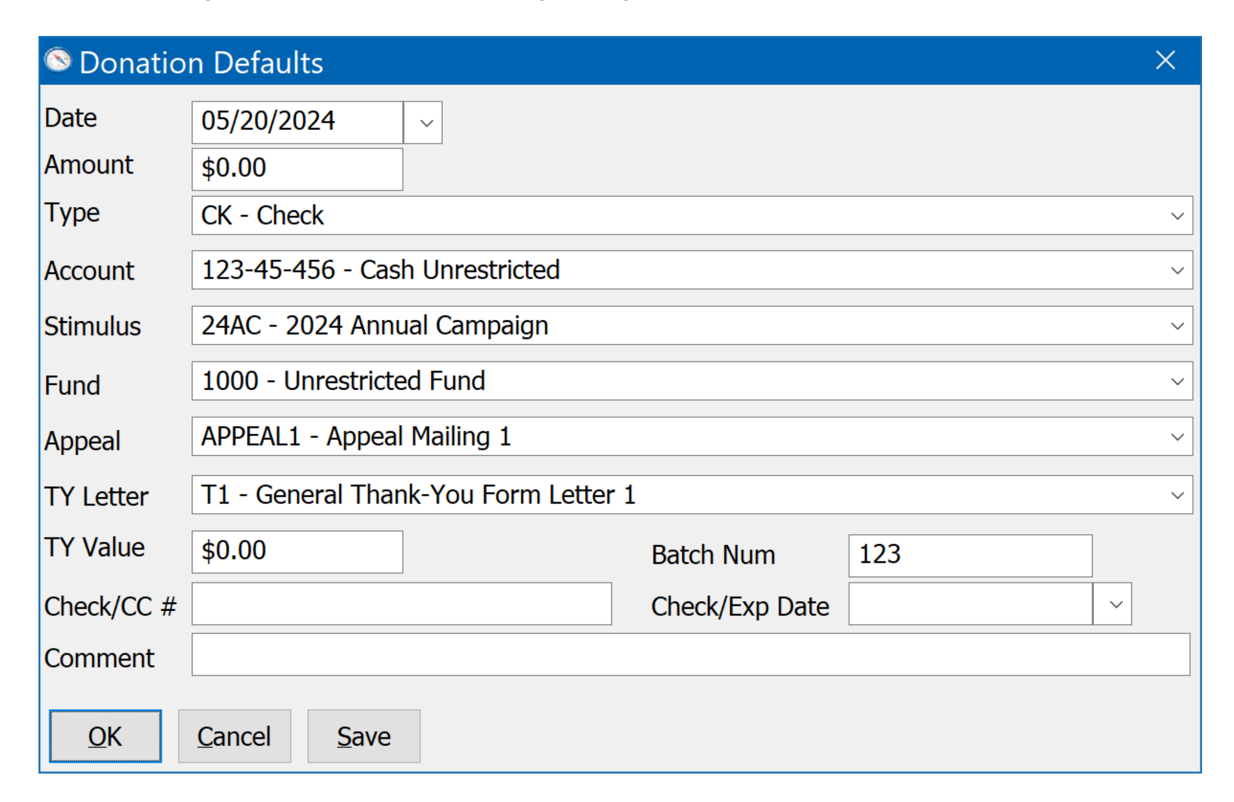
You may enter any desired defaults for the Main Information tabs you have access to, then click OK to save and close. Note that while defaults are entered for you each time you add a new donor (constituent) record, you can always override them on a case-by-case basis by typing over them when adding a new record. They are simply meant to save you entry time by putting the most common values in place for you as a starting point for new records.

4.5 Donation Default Field Values

Configure, Donation Default Field Values

Like the Main Information default values, the donation default field values allow you to specify the default entries you would like DonorQuest to enter for you automatically when adding a new donation. Again, the primary purpose of the default values are to speed data entry of repetitive codes, etc. Like the Main Information default values, Donation default field values are also user-specific. This means that you can set your own defaults without interfering with the defaults selected by other users. Your defaults will remain in effect until you change them.

To access your donor default field values, click on Configure, Donation Default Field Values. Doing so will show the following dialog:



4.6 Campaign Goals

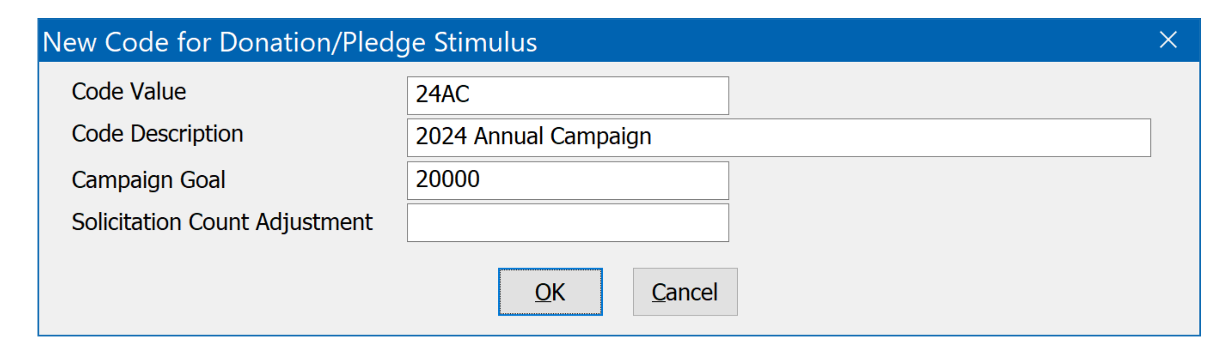
Configure, Edit/Print A Code Table

Campaigns are set up and tracked in DonorQuest as a Donation Stimulus (the terms Campaign and Donation Stimulus are often used interchangeably). A campaign or stimulus goal can be entered when setting up the stimulus code in the Code Table list. Having a goal for each campaign allows you to view up-to-the-minute statistics for each

campaign.

To Set Up a Campaign Goal:

1. Click Configure from the menu, then Edit/Print A Code Table.
2. Scroll down to Donation/Pledge Stimulus.
3. Click Open. Click Add to add a new stimulus or Edit to edit an existing code.
4. Enter a code for the new campaign (up to 20 characters), the campaign description, and the campaign goal in the following window:



4.7 Setting Up Coded Fields

Configure, Edit/Print A Code Table

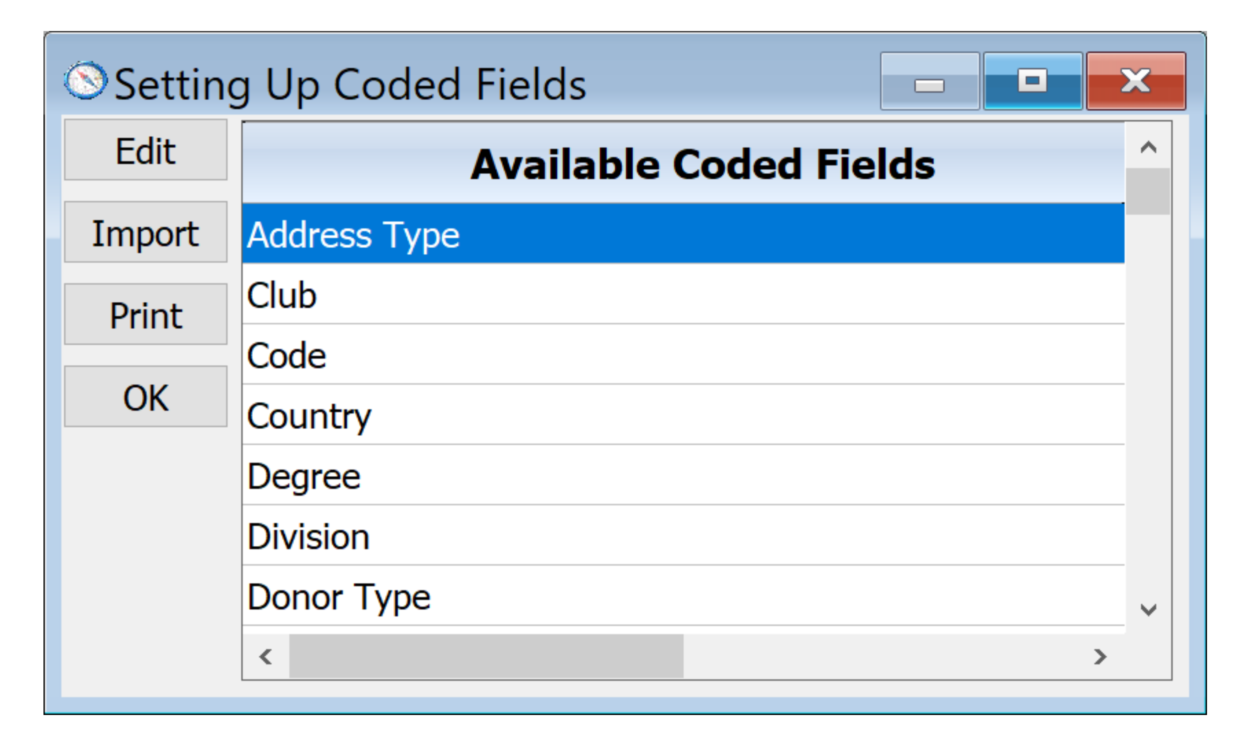
Many of the fields within DonorQuest are coded fields. They can store anywhere from a 1 to 20 character alphanumeric code depending on the field. These codes are completely defined by you, and they are typically used to track standard information about each donor account. Examples of coded fields include the List codes on the Constituency Tab of the Main Information dialog, and the Stimulus code in the donation and pledge windows. Codes provide a quick and concise way of categorizing data that is validated by DonorQuest during data entry. Codes facilitate consistent data entry by all users, since they are all working from the same list of valid codes created and agreed upon by the decision makers in your organization. For example, if it is decided that the donations for your 2017 annual campaign are to all have a Donation Stimulus code of 17AC, then you would create a new Donation Stimulus code 17AC (along with a meaningful one-line description of what the code means), and DonorQuest would then allow 17AC as one of the valid codes for Donation Stimulus. DonorQuest would also display 17AC and it's description on a drop-down list of valid code for Donation Stimulus during data entry so that users do not have to know what the valid codes are for Donation Stimulus, though if they do they can also type them directly when adding a new donation. During data entry users may also type a partial code and press the down arrow for DonorQuest to auto-complete the code.

Since all codes are defined by you, you will want to setup the codes needed initially by your organization. Codes may also be defined on-the-fly in data entry (by users who have been granted that specific right under User Account Setup), but can only be edited or

deleted under the Edit/Print A Code Table menu. There is no set coding convention in DonorQuest. How you create your codes is really up to you. There are some things to consider however. Normally codes always appear on display and reports in alphabetical order. You could code your Annual Campaign donations as 17AC or AC17 - the difference would be that on a summary report of all your campaigns, if you adopted the convention that the year comes first in a code, such a report would show all of the campaign codes together for each year. If you were to code with an AC17 convention, such a report would have all of the Annual Campaign totals for all years grouped together chronologically, before starting the years all over again for the next campaign code. It is even possible to simply leave out the year and have just AC, but then most displays and reports (but not all) would show a combined total for all of your annual campaign donations. The exception would be some specialized reports, such as the, "Donations - Grouped By Year and Stimulus" report which uses the Donation_Date field to separate out donations by year.

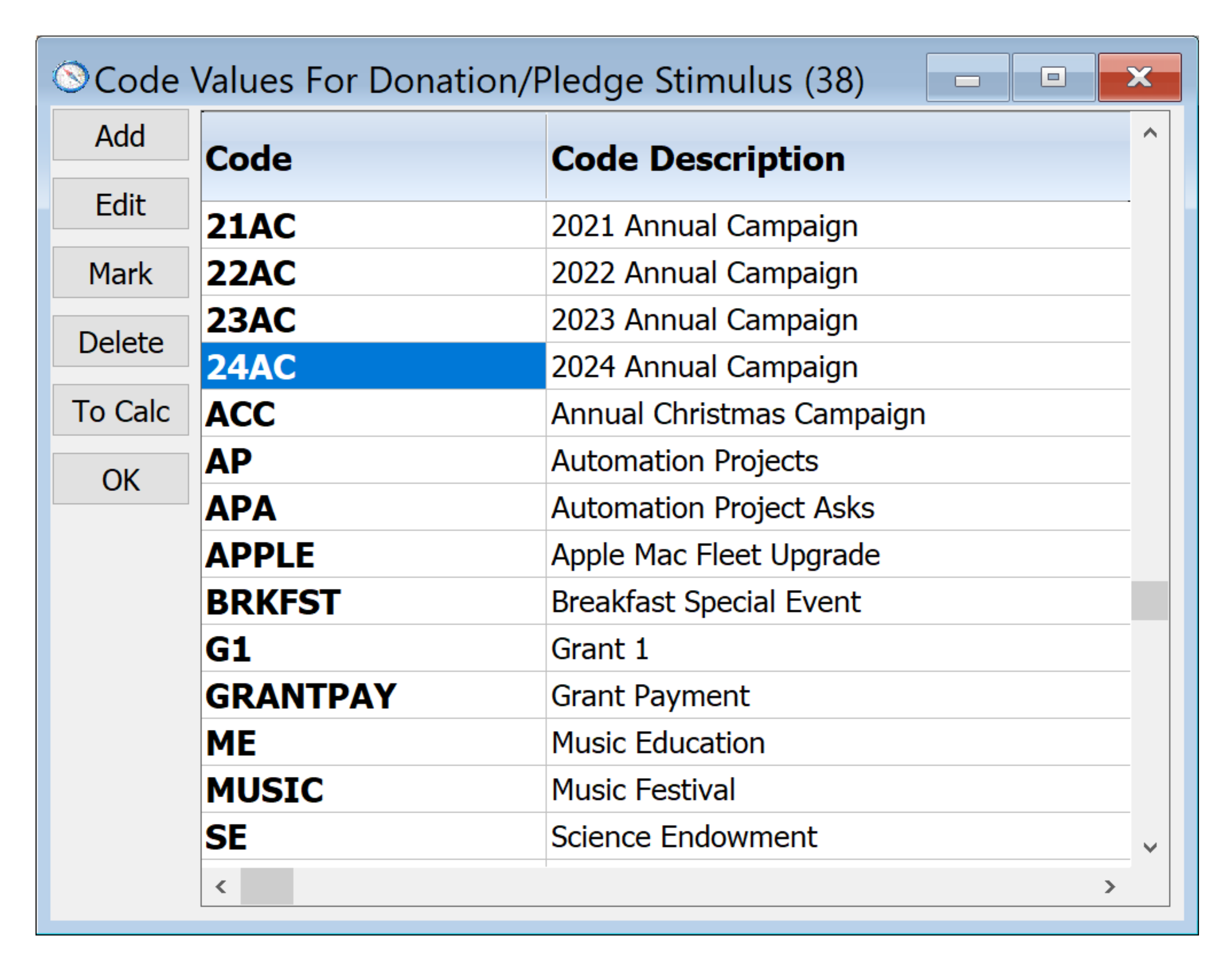
Working With A Specific Code Table

Selecting Configure, Edit/Print A Code Table will open the Setting Up Coded Fields dialog which has a list of all the fields in DonorQuest which are coded fields (including an user-defined coded fields), and as such have a corresponding code table associated with them. These codes are shown in the various drop-down lists during data entry. At this level there are three things you can do with a code table - edit it, import new codes to it from an external file, or print it.



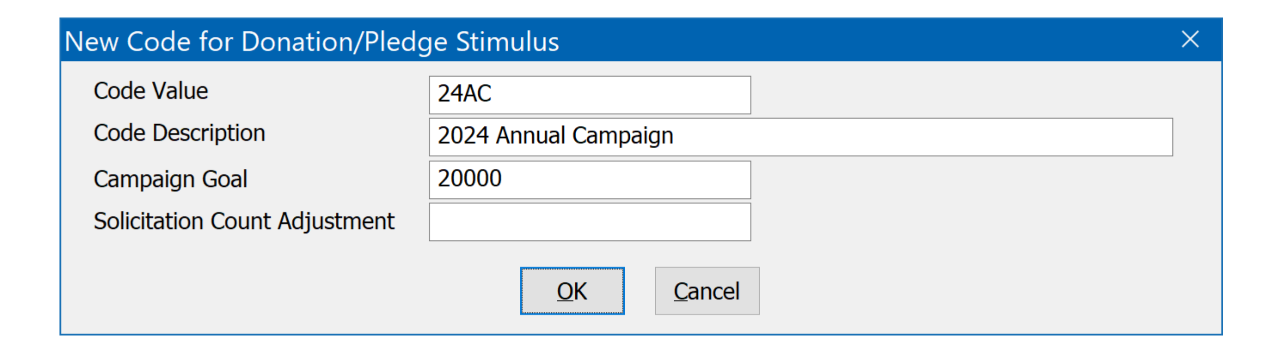
4.7.1 Editing A Specific Code table

Clicking on the Edit button of the Setting Up Coded Fields dialog will give you edit access to the code and code description pairs of a specific code table. For example, if you were to highlight the Donation/Pledge Stimulus field in the Setting Up Coded Fields dialog and click the Edit button, the Code Values For Donation/Pledge Stimulus dialog would appear if you are using our sample database:



Adding A New Code

Clicking the Add button will allow you to add an entirely new code entry to the code table you are editing. A code entry usually consists simply of a code and code description. Some code tables have additional elements specific to them. For example, the Donation Stimulus code entries also allow you to specify a fundraising goal for each Donation Stimulus. In DonorQuest, the terms Campaign and Donation Stimulus are used interchangeably. Technically, a gift could be stimulated (or caused to happen) by something other than a campaign, so that's why there is some distinction. But in practice they are the same. Here is what the New Code dialog looks like:



Editing, Marking, And Deleting Codes

The Edit button of the Code Values dialog will open a form similar to the one for adding new codes, but will let you change the code or code description for existing codes. Note that changing a code here will not affect any donor history. The code tables only control the list of valid codes a data entry person may choose from for future entries. They do not have any effect on past entries. For example, if a block of donations were added with a stimulus code of ABC, but you then decide it should have been DEF, changing it in the code table setup will not automatically find all the donations with a stimulus of ABC and change it to DEF. This sort of operation can be done, but it is done using the Mass Data Operations feature of Selections. Likewise, the Delete button of the Code Values dialog will delete a code so that it is no longer available for use with future entries, but it does not remove the code from past entries. So, for example, once a campaign has ended and you will no longer be adding new donations with a stimulus of 17AC, you can delete the 17AC code here since it is no longer needed for new donations. But all the historical donations bearing this code will remain unchanged, as will any reports drawing on these donations which show past campaign totals. You may also still run queries (selections) for historical records containing past codes which are no longer in use.

At times you may be doing a lot of "clean-up" of old codes and wish to delete a large block of them at once. To avoid be prompted for confirmation for each code you wish to delete, you may first mark them using the Mark button, then click the delete button to delete them all at once with a single confirmation. If many of the codes you want to delete are consecutive, you may use the keyboard shortcut of Alt-M to mark/unmark multiple codes without having to click the Mark button multiple times.

Copying Codes To Excel

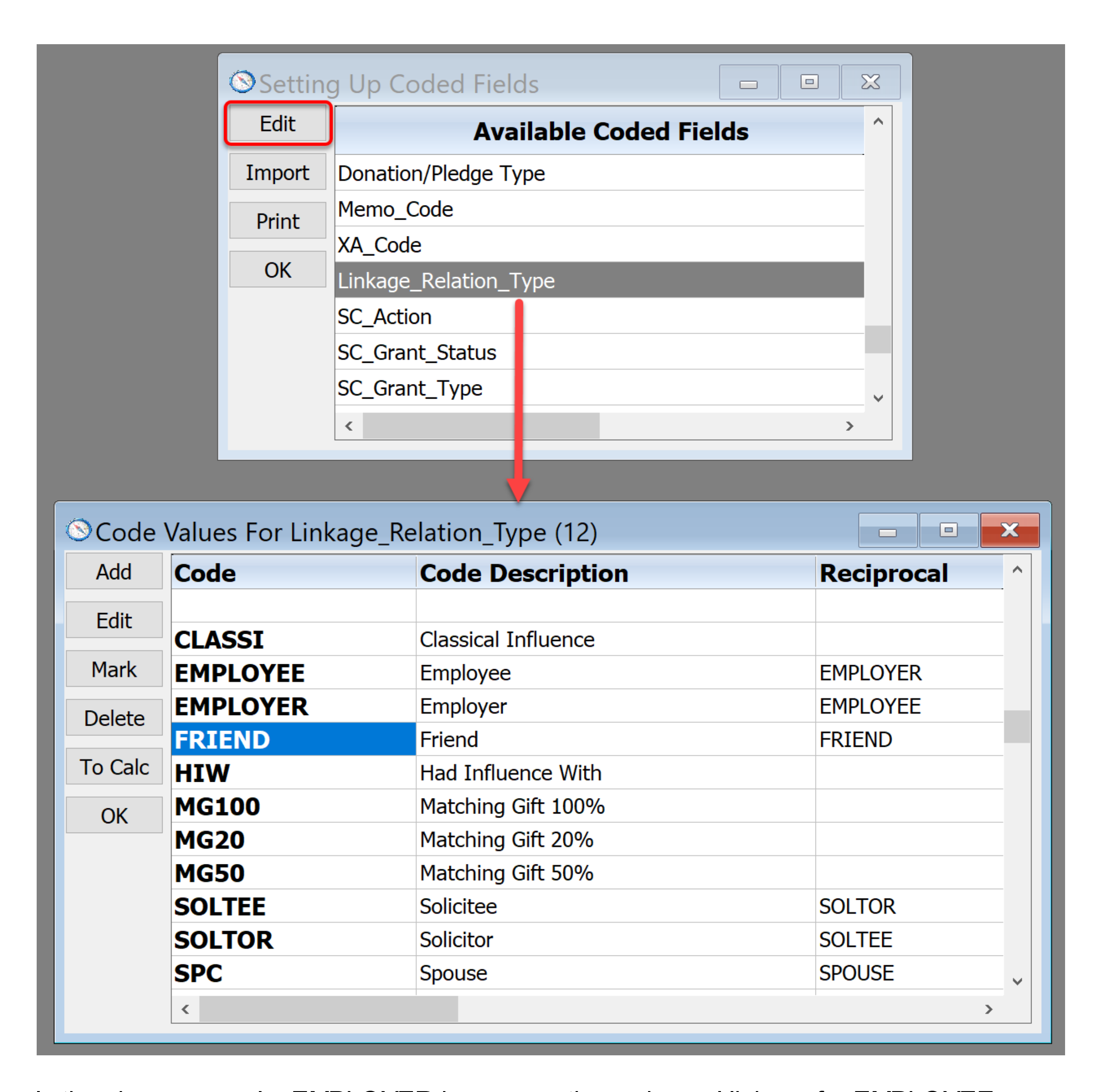
While DonorQuest allows you to print a code table for review by others who may not have access to DonorQuest, you may also copy a complete code table to Excel by clicking on the ToExcel button. This will automatically open Excel and populate a new spreadsheet with all the codes in the DonorQuest code table you are editing. When you do this for the Donation Stimulus code table, additional statistical information will also be included. Note that the cloud-based version of DonorQuest uses a spreadsheet application named, "Calc", and in that case the button would be labeled ToCalc.

Solicitation Count Adjustment

The Edit button of the Code Values dialog will open a form similar to the one for adding new codes, but will let you change the code or code description for existing codes. Note again that changing a code here will not affect any history. DonorQuest allows you to do in-house donor and prospect mailings using the names already in DonorQuest, and will even track the rate of return for you using the Solicitation Tracking feature. But often times direct mail solicitations for specific campaigns are done by an outside 3rd party mailing house, sometimes combined with mailings you do in-house using donor and prospect records you already have in DonorQuest. DonorQuest allows you to make a manual adjustment to the total count of mail pieces sent for each of your stimulus and appeal codes to reflect mailings done by 3rd party mailing houses. This allows the DonorQuest campaign analysis reports to accurately reflect the combined return rate for all of your in-house and 3rd party mailing house campaigns. For example, if you did an in-house mailing of 5,000 pieces of mail for your 2014 Annual campaign, and an outside mailing house did another 15,000 for the same campaign, you would enter 15,000 for the Solicitation Count Adjustment for that campaign code.

Reciprocal Linkage Codes

DonorQuest supports linkages between constituent accounts, such as employer-employee, father-son, friend-friend, etc. Most relationships are reciprocal, meaning that if constituent A is related in some way to constituent B, then B also has a relationship to A. When you setup linkage codes in DonorQuest, you can specify a reciprocal code for each primary linkage code. When you click on Configure, Edit/Print A Code Table, and you edit the Linkage_Relation_Type code table, you can set a reciprocal linkage code for each code, like this:



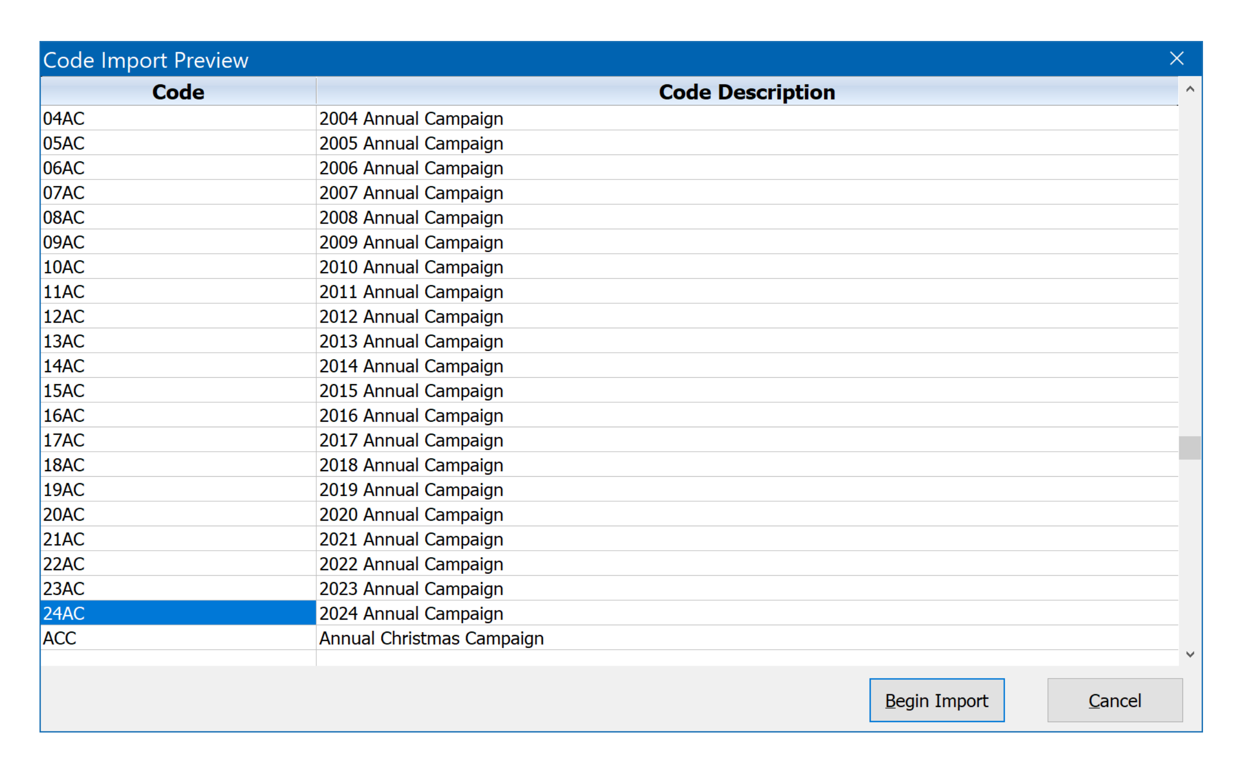
In the above example, EMPLOYER is seen as the reciprocal linkage for EMPLOYEE, so anytime you add a new employee linkage to a donor account, DonorQuest will automatically add the reciprocal linkage code of EMPLOYER to the linked account.

4.7.2 Importing Codes

In addition to manually setting up new codes, you may import them from a file. This is useful if you are working with a mailing house which does campaign mailings for your organization, and they provide you with a long list of response codes which may correspond to segments of a given mailing. Clicking on the Import button of the Setting Up Coded Fields dialog will prompt you for the name of a file to import from. The file must be a tab or comma-separated value (csv) file with two columns -- the first containing the code and the second the code description. The code column must come before the code

description column.

When you click the Import button of the Setting Up Coded Fields dialog, you will be shown a standard file selection dialog. Navigate to and open the file containing code and code description pairs to import. You will then see an import preview dialog which will look like this:



Code	Code Description
04AC	2004 Annual Campaign
05AC	2005 Annual Campaign
06AC	2006 Annual Campaign
07AC	2007 Annual Campaign
08AC	2008 Annual Campaign
09AC	2009 Annual Campaign
10AC	2010 Annual Campaign
11AC	2011 Annual Campaign
12AC	2012 Annual Campaign
13AC	2013 Annual Campaign
14AC	2014 Annual Campaign
15AC	2015 Annual Campaign
16AC	2016 Annual Campaign
17AC	2017 Annual Campaign
18AC	2018 Annual Campaign
19AC	2019 Annual Campaign
20AC	2020 Annual Campaign
21AC	2021 Annual Campaign
22AC	2022 Annual Campaign
23AC	2023 Annual Campaign
24AC	2024 Annual Campaign
ACC	Annual Christmas Campaign

Examine the preview carefully to be sure the codes are in the Code column, and the code descriptions in the Code Description column. Click on Begin Import to actually commit the codes to the DonorQuest code table.

4.7.3 Auto-Expanding Code Tables

Configure, Auto-Expand Code Tables

If you having imported a lot of donor data into DonorQuest which includes coded fields, you may wish to have DonorQuest auto-populate the code tables for you with the unique new codes. Clicking on Configure, Auto-Expand Code Tables will cause DonorQuest to go through your entire donor database, including all past entries, looking for codes which exist in the database but are not on the drop-down lists for the various coded fields, expanding the drop-down lists to include any such codes. This is something you may want to do when you are initially moving your data from another fundraising system to DonorQuest to give you a head start in setting up your code tables. You will still need to enter the proper description for each code manually once the codes themselves have been added to the various code tables, and you do this using the Configure, Edit/Print A Code Table option. However, auto-expanding your code tables once you have had DonorQuest in operation for years is not something you generally want to do, as it will have the effect of bringing

back every obsolete code you have used in the past, including any obsolete codes you have deleted over time from the drop-down lists supporting the code tables. If you run this procedure by accident, you may restore all of the code tables to their previous state by copying the file CodeTbls.dbf from one of the backup folders DonorQuest creates automatically to the \DQuest\System\ folder, replacing the current (live) file. Be sure no one is using DonorQuest when you do this. If you do this, you also need to run the System, Index, System Tables option. To restore previous code tables for the cloud version of DonorQuest, please contact DonorQuest Support and request the action be done for you.

Topic V

5 Quick Start Guide

The DonorQuest Quick Start Guide is a tutorial that will walk you through the basics of DonorQuest. It is intended to familiarize you with the DonorQuest Toolbar and the DonorQuest environment. You will be introduced to data entry, performing queries and printing reports. More detailed information about each subject of the quick start guide can be found by opening the relevant section of the help guide. The Quick Start Guide was created with the sample data provided with the trial version of DonorQuest. So if you are running the trial version, the sample data you see should match up with what you actually have in your database at this point. If you have already purchased and installed DonorQuest, then of course the actual data you see will reflect your live data so take care not to make any changes just for the purpose of following the examples here.

If you are new to DonorQuest yet your organization has been using it for some time and you would like to just "practice" on it by following the examples shown here, then you might consider installing the trial version of DonorQuest to create a temporary copy of the program with sample data on your workstation which you can later delete and which will have no connection to your organization's live data. You can install the free trial version of DonorQuest (along with sample data) by clicking on the following link:

www.DonorQuest.com/downloads/DQDemo.exe

If you are using the online version of DonorQuest, you can still benefit from installing the trial version for experimentation as you are learning. In our design, we have taken care to make the look and feel of both versions very similar, so that there is essentially no learning curve in transitioning from one to the other.

5.1 DonorQuest Datasets

DonorQuest is a database designed to collect, store and retrieve donor data. The retrieval part of this cycle is what turns data into information - information that can help your organization achieve a better understanding of your donors and their behaviors. Actionable information can be as basic as querying for your important donors, and sending out a mailing acknowledging their generous giving in the past, and kindly asking them to move up to even higher giving levels. Or for your most generous donors, it can mean establishing and tracking a meaningful dialog with them, and storing detailed notes about each interaction using the DonorQuest contact manager - a very powerful tool in DonorQuest used to cultivate very personalized relationships with donors, scheduling future dialogs which DonorQuest will remind you of as they come due. In fact, each DonorQuest user may schedule a contact event just between themselves and specific donors. This allows for whole teams of moves management workers within your organization to have their own list of donor interactions scheduled, based on their DonorQuest user login name.

Note that the terms Donor and Constituent are often used interchangeably in this user's guide, but technically a donor is a constituent who has actually donated something in the past. Constituent is a more general term referring to both prospects and donors. Both

prospects and donors are stored in the same master table in DonorQuest, so that when a prospect becomes a donor, they do not have to be moved anywhere. This also means one simple search will find both donors and prospects and present matching records in a consolidated spreadsheet-style view. When you get the first donation for a prospect, they simply become a donor once you enter their first gift. While the master biographical (name/address) table stores both donors and prospects, they can easily be separated as needed by running a very simple query.

The DonorQuest database is divided into three datasets, Donor, Archive and Buffer. These datasets are segmented datasets, meaning that the data contained in any one dataset does NOT flow across to any other of the datasets. You will see these terms on many DonorQuest displays and options. Typically, you will only be working in the Donor dataset.

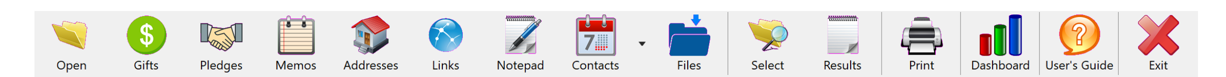
The Donor dataset is where all the information about your active donor accounts is stored. This includes data about all donor names, addresses, donations, pledges, memos, etc. The other two datasets should NOT be used to store information about your active donors.

The Archive dataset is used to store donor records that you wish to retain, but do not want in your active, Donor dataset. Generally, you should not move any donor records out of the Donor dataset that have any donation or pledge history, because doing so will cause that data to drop out of reports which reference historical data. For example if a donor is removed from the Donor dataset, their individual donation information will not show up on a campaign summary report which covers all campaigns for all time. Note that there is a status field named, "Inactive" in DonorQuest which allows you to mark a constituent (donor or prospect) as being inactive while still keeping them in the Donor dataset, allowing their historical donation data to still appear on reports, while keeping them out of routine queries for mailings and such. If a constituent is moved to Archive, they are essential gone from active consideration for anything, but can still be retrieved in the future if need be.

The Buffer dataset may be used for temporary copies of donor accounts or as an intermediate step in the donor data import process. While working in the Buffer dataset, you are free to make changes to the records without affecting the master copy of a donor record housed in the Donor dataset. The Buffer dataset can be routinely purged, so never place any information in it which you wish to keep.

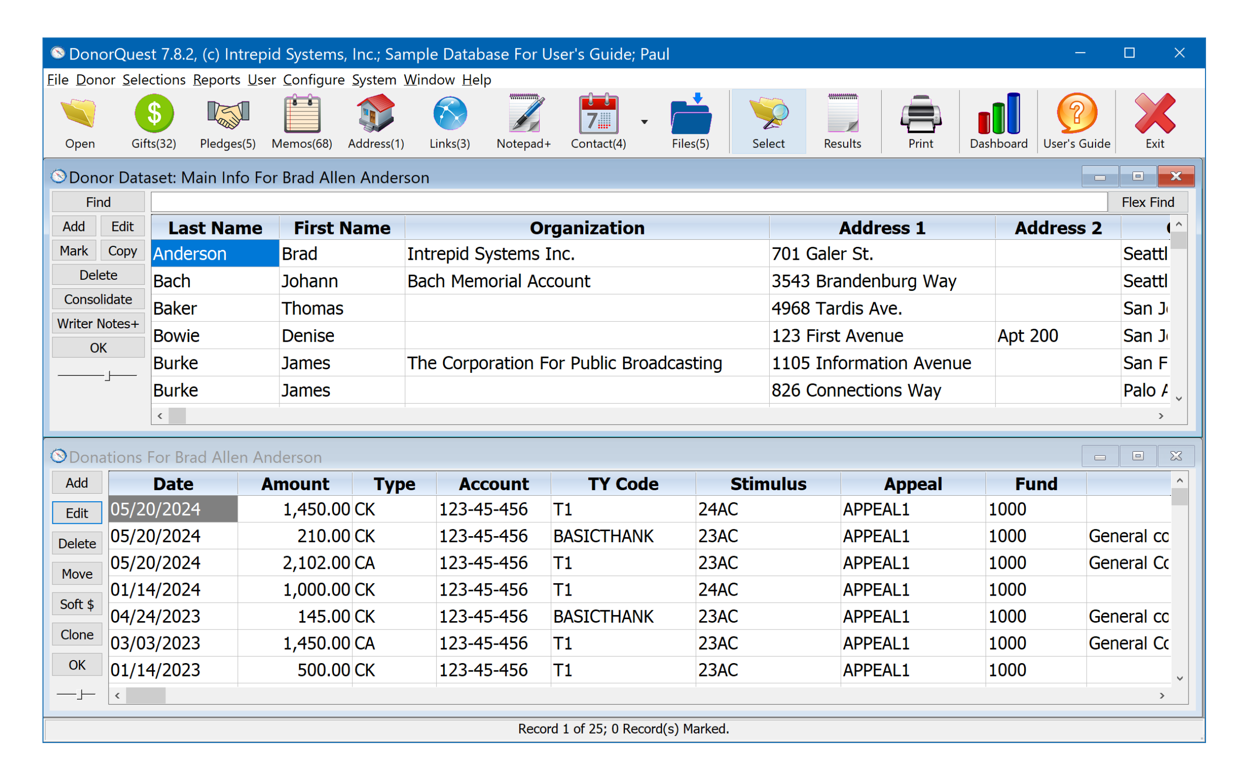
5.2 The DonorQuest Toolbar

Once you launch DonorQuest, you will see the DonorQuest toolbar:



The DonorQuest toolbar provides quick and easy access to all data entry forms as well as other important DonorQuest functions, such as creating selections (queries) and reports. Once you have opened one or more data windows, the toolbar will update to show you how many records for the current donor exist under each tool bar option -- even for data windows which you have not yet opened. For example, if you open only the main information window and the gifts (donations) window, you can still know whether pledges, memos, extra addresses, etc. exist for the current donor by glancing at the tool bar. Note that the terms gifts and donations are used interchangeably in DonorQuest. Where space is limited (as in the tool bar) the term gifts is used.

In the following example, DonorQuest is showing the Main Information View and Donation windows:



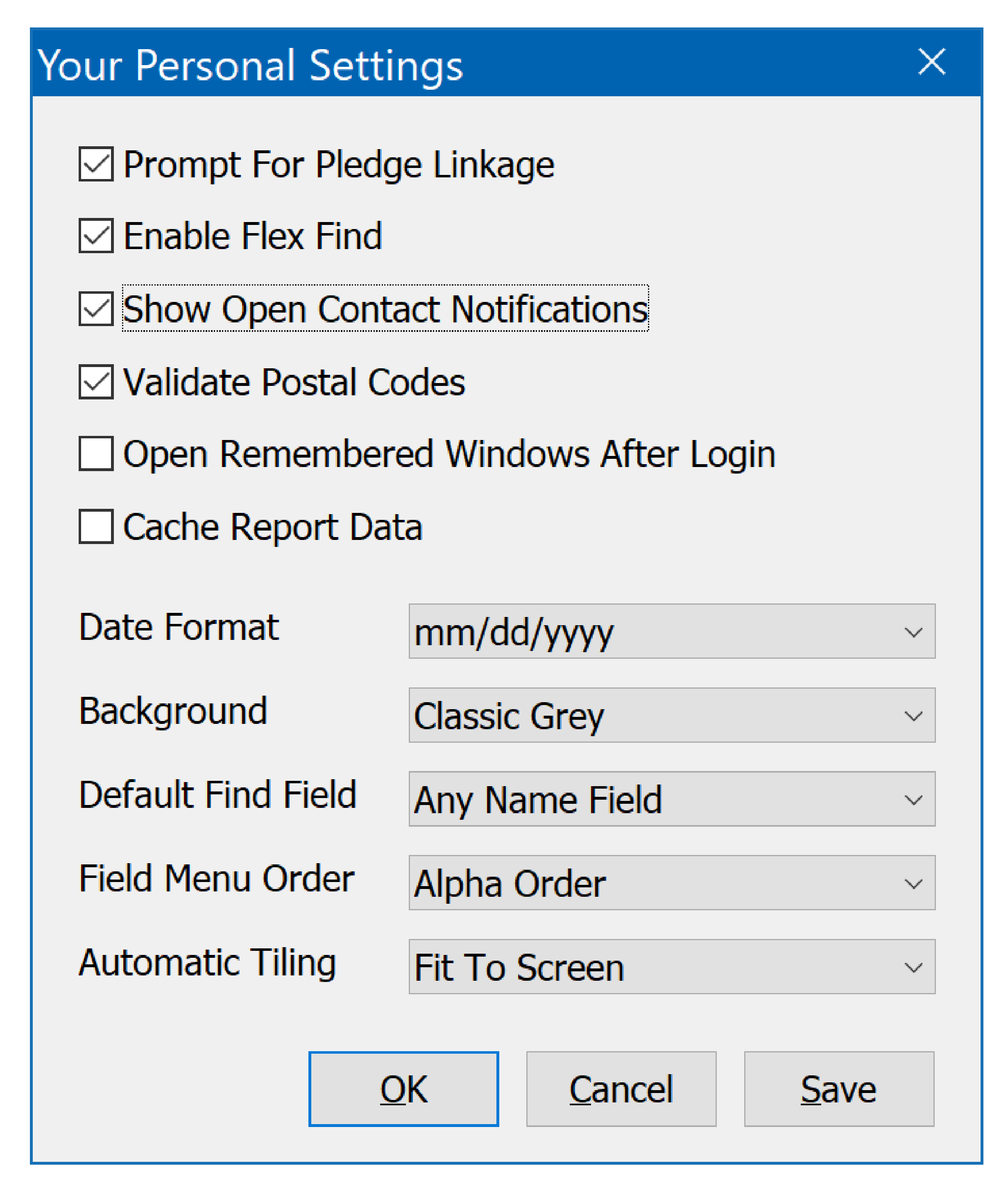
Note that the size of the font used to display data in many DonorQuest Windows can be changed using the horizontal slider bar, shown in the above example just below the OK button for each window. As with other window settings, the font size is user-specific, so you may adjust the font size to your particular taste without affecting how other DonorQuest users see the same windows, and DonorQuest will remember your preferences between sessions.

It is easy to see the highlighted donor, Brad Anderson, has donations because the donation window is open showing his gifts. But we can also see that he has pledges, memos, a single extra address, etc. without actually having those windows open. If we want to see his pledges, all we have to do is click on the pledges icon to open the pledge window. You can have as many data windows open at once as you wish, depending on how much space you have on your display to allow for comfortable viewing and sizing of the open windows. Generally it is a good idea to just keep the windows you use most frequently all open at once, then open additional ones as needed. DonorQuest will always

remember the size, position, and column arrangement of all it's data windows according to your preference. If you are working on a device with a small screen (such as a laptop or tablet), it is best to position your open windows such that the Main Information window (showing names and addresses) is always in the top half of your display, with one of the other data windows taking up the lower half. You can then use the tool bar icons as tabs to easily bring the various related data windows (Donations, Pledges, etc.) into view on the lower half of your display. This arrangement is accomplished by opening all the windows you need, then clicking on the Window menu option at the top of your display and choosing the Tile Vertically With Main Window Priority option.

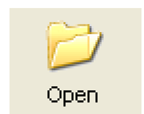
You can also resize columns and move them around within each window, and that is also remembered for your user account between sessions. An entire column may be moved left or right relative to the other columns by holding down the left mouse button with the mouse pointer in the title area of a column. Simply drag and drop. Columns may be resized by positioning the mouse pointer in the column title area between two columns, then clicking and holding the left mouse button while dragging the mouse left or right. Lastly, columns you are not currently using may be hidden by doing a right-mouse-click with the mouse pointer within the title area of the columns. A vertical list of all columns for the current window will then be shown, and you may turn off check boxes for columns you wish to hide, or turn back on the check boxes for columns you wish to display again. More advanced column setup can be done under User, Change Your Window Column Preferences.

Once you determine the data windows you generally like to have open all the time, you can click on User, Remember Your Open Windows. This will cause DonorQuest to always open your preferred windows when you click on the Open button of the DonorQuest tool bar. You can also have DonorQuest automatically open your preferred windows each time you start DonorQuest. To do this click on User, Change Your Personal Settings, and make sure "Open Remembered Windows After Login" is checked on, as shown here:



Your DonorQuest window configuration is tied to your DonorQuest user account, so any changes you make will not interfere with the DonorQuest window preferences of other users.

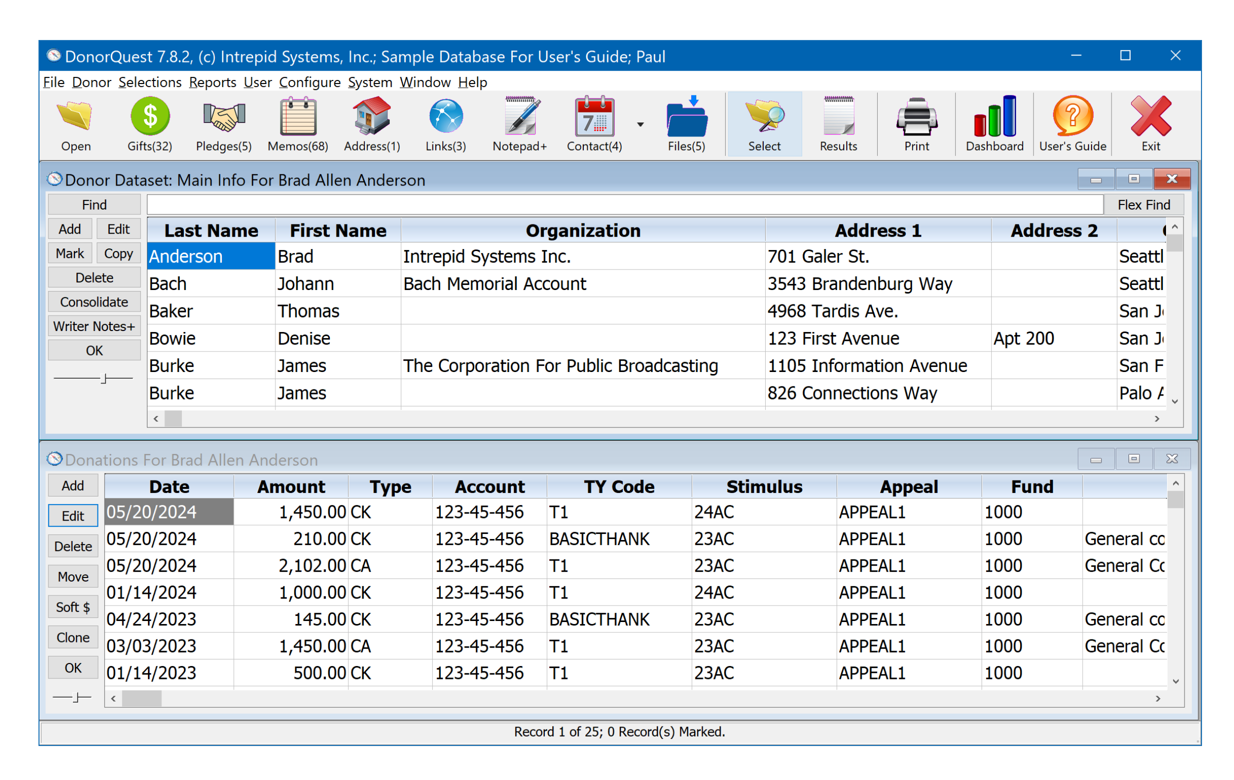
5.3 Open Files Button



The Open button on the DonorQuest Toolbar opens your main data entry windows (normally the Main Information Datasheet window and the Donations Datasheet window, as shown below). The windows that open, their size, and relative positions may be customized for your account. That way, each time you click the Open button, the windows you use most often will be automatically opened and positioned according to your preference. For example, some users can choose to see the Main Information and Donations each time while others could see the Main Information and Memos.

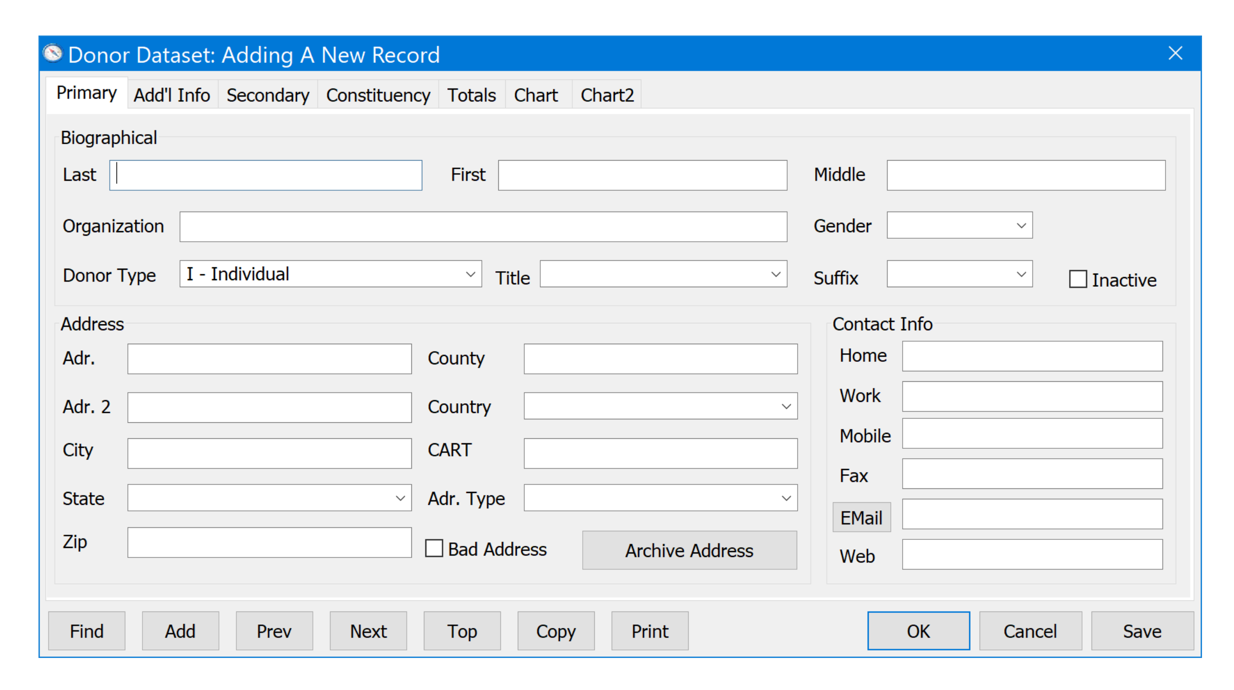
To setup those windows you'd like to have open automatically when you click the Open button, do the following. Open the specific windows you wish to have open each time, then organize them exactly where you want them. Next, click on User, Remember Your Open Windows. Now every time you click on the Open Files button, it will open windows according to your preference.

In the following example, DonorQuest is showing the Main Information View and Donation windows:



Adding a New Donor

Now we will go through the process of adding a new donor account. Click the Add button on the Main Information Datasheet to open the donor entry window (shown below):



As an example, enter the following information:

Hayward in the Last Name field.
Justin in the First Name field.
1701 Enterprise Way in the first Address Line field.

Without entering the City and State, enter 98109 in the Zip field and press the Tab key on your keyboard. You'll notice that the City, State, and County are automatically entered for you. Click on the Save button. This will save the new record and it will appear with the other names on the Main Information View.

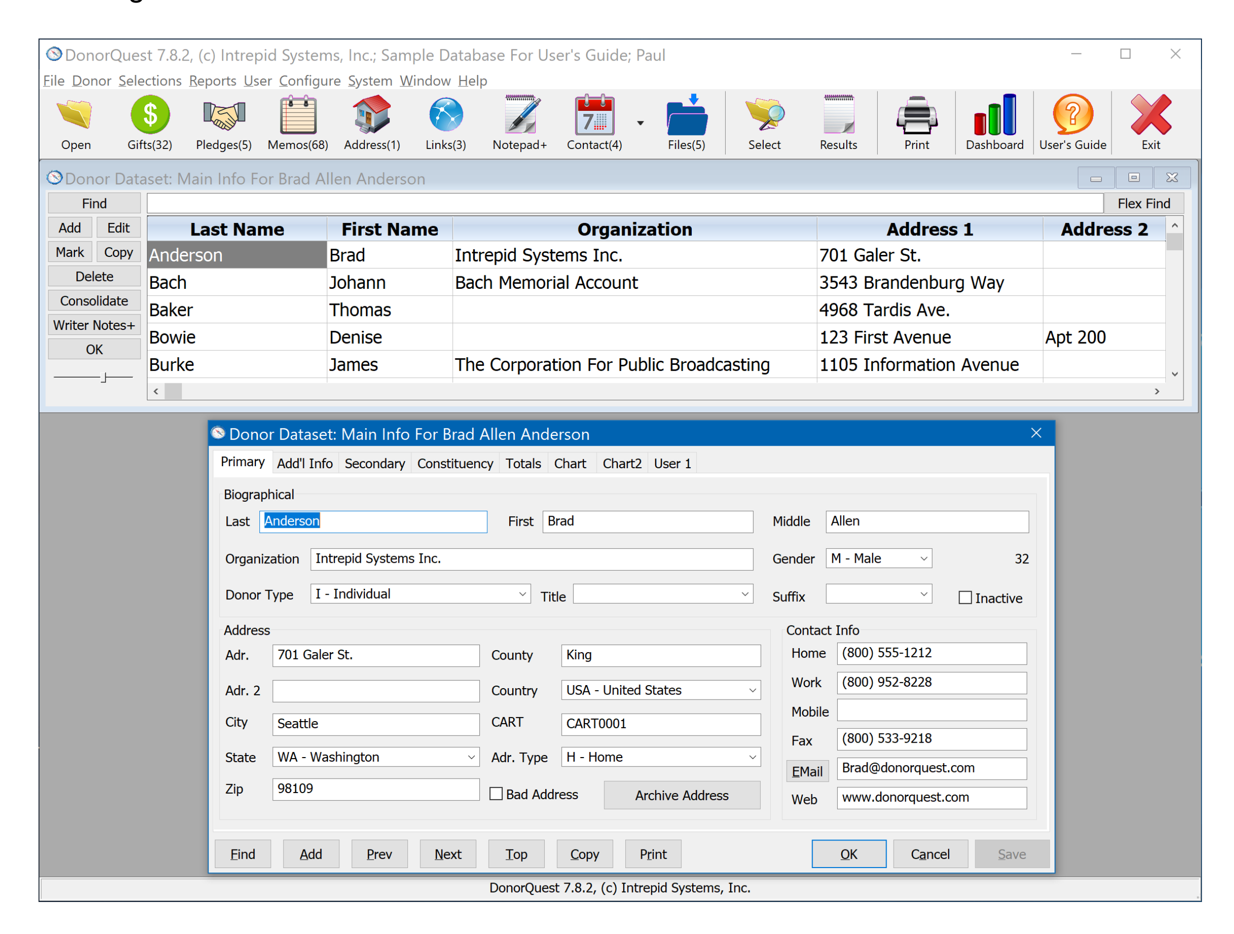
Note: If you are using the sample database provided with the DonorQuest trial version, you should have seen a warning prompt you of a possible duplicate donor. DonorQuest does an automatic duplicate record check when adding new donors. The duplicate check examines the First Name, Last Name, Organization Name, and Address fields, and notifies you if it finds a possible duplicate donor. If it does, it will notify you and give you a choice of saving the record as is, or making additional edit changes before saving it.

For the purposes of this exercise, go ahead and save the duplicate record. We will be using it later when we explore the Duplicate Record selection and consolidation features of DonorQuest.

Navigating Your Database Quickly and Easily

DonorQuest gives you different options for viewing and navigating your database. You can see the datasheet view, the forms, or a combination of the two. For example, orient your

DonorQuest windows so that you are able to see the Main Information Datasheet and edit form together like this:



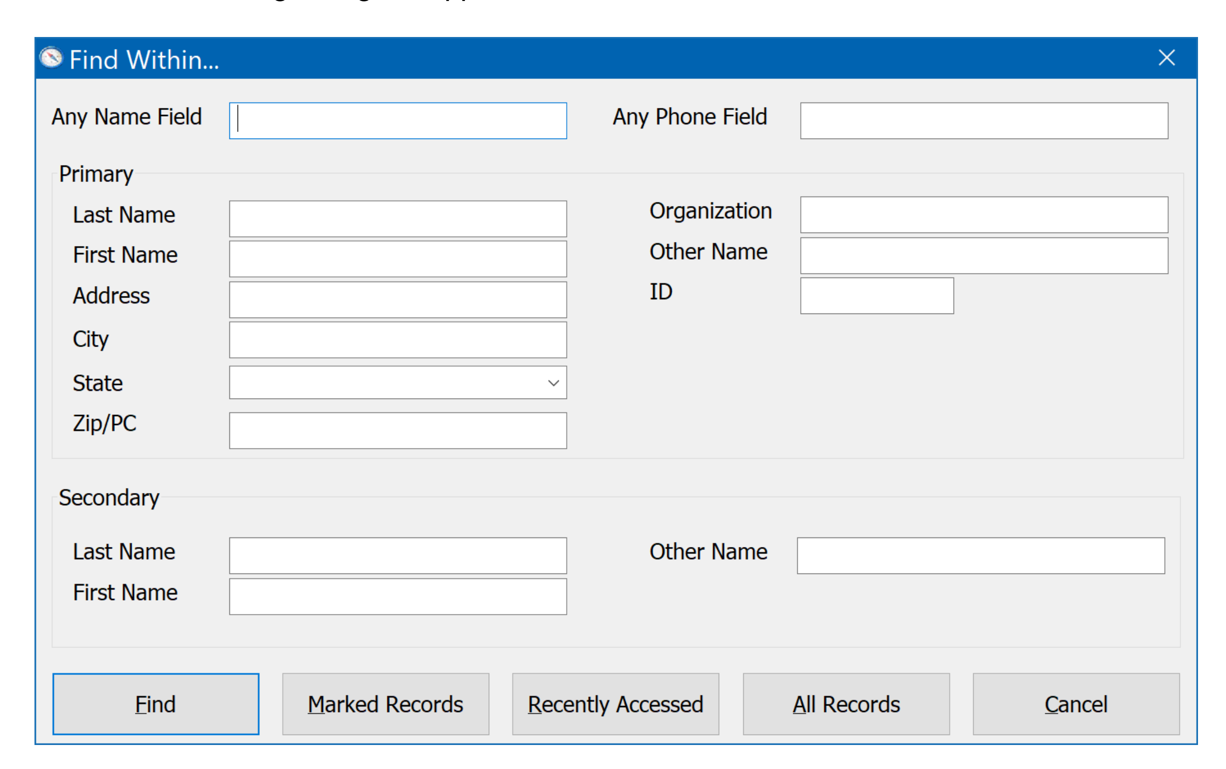
Set focus to the Main Information Datasheet (the spreadsheet display) by clicking on someone's Last Name. You can tell when a datasheet or form has focus because one of the fields will have a deep blue background with white text. In the above example, the Main Information View datasheet has focus because the last name Anderson is shown with the blue highlight. Using your Up and Down arrow keys (or mouse wheel), scroll down through the sample donors in the database. Notice that all donor information updates simultaneously in each window, remaining in sync with the data for the currently highlighted donor. This would be true for any other DonorQuest windows you have open, such as Donations, Pledges, Memos, etc. This allows you to get a big picture of your donors without having to constantly flip through a bunch of tabs. This capability is especially useful on large display screens.

Finding A Donor Record

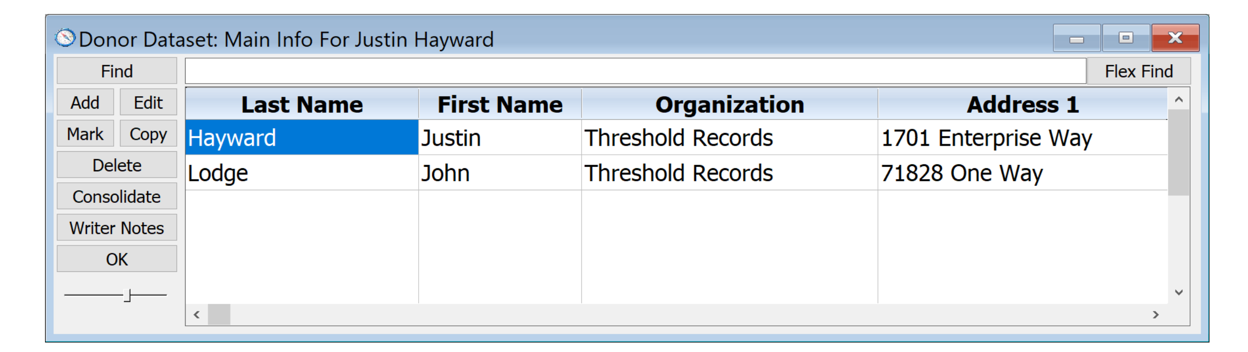
There are three ways to quickly find donor records. One is the incremental search. With the Last Name column of the Main Information Window highlighted as shown above, begin typing the letters of the last name Hayward. You will see the display update as you type the name, getting closer with each letter you type. You can search this way in other columns as well, such as in the Organization Name column. Before searching a column with the

incremental search, you must first order the display by the column by clicking on the title for the column. Then the letters you type will be used for incremental searching within the newly sorted column. Notice that the letters you have typed so far are shown at the bottom of the main DonorQuest program window. You may use the backspace key to remove the most recent character, or the Shift-Backspace key combination to completely clear your search key.

The second way of searching is by using the Find button. When you click on the Find button, the following dialog will appear:



Within the All Names Field, type the three letters hay, then click the Find button. You should see:



DonorQuest searches across and within all name fields (first name, last name, other name, organization name, etc.) for a word or phrase starting with the letters you have typed. This means that you can type just the first few letters of the word you are looking for and DonorQuest will find it. If no direct matches are found, DonorQuest will next search

phonetically. So, even if you happen to miss-spell a name, it is still likely DonorQuest will be able to find the donor record!

In our example search, notice that two names appear in the Main Information Datasheet, Justin Hayward and John Lodge. Justin Hayward's name was found because of the "hay" at the start of his last name. Why is John Lodge's name here? Well, if you scroll over to the right, you'll see Justin Hayward listed in John Lodge's other name field. Since DonorQuest shows you all possible matches to your key name search, you can be sure and get the right donor before proceeding with the donation entry.

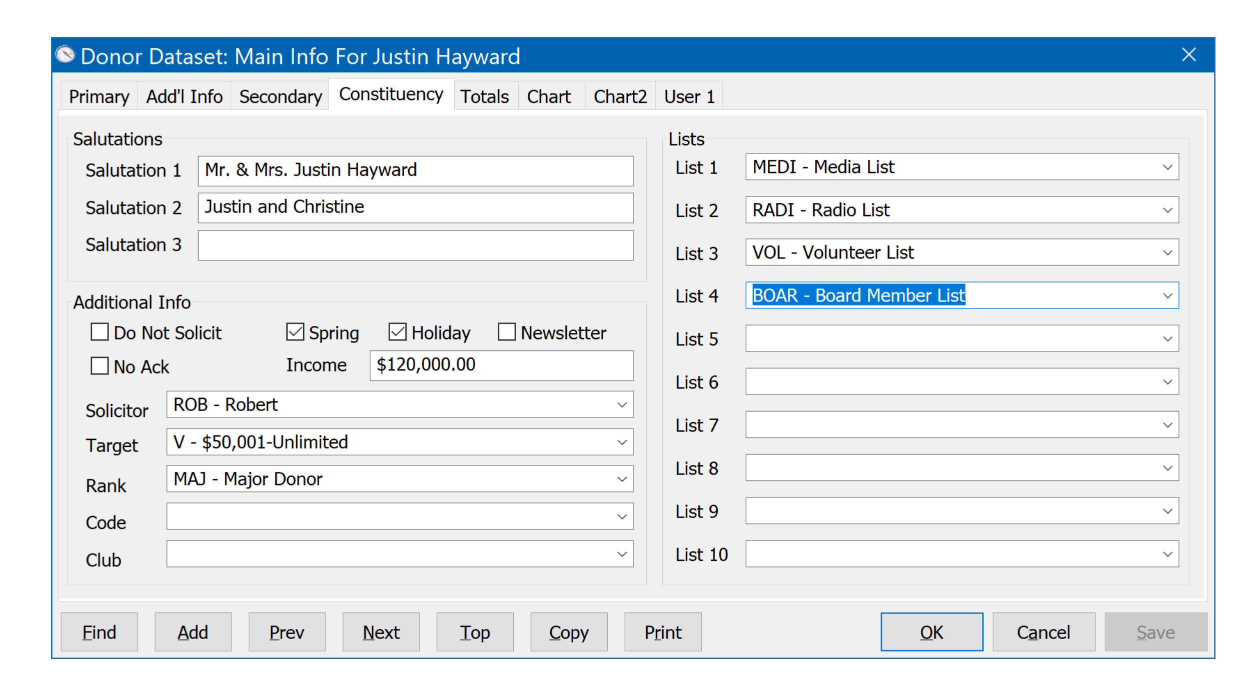
The Find button allows you to search for donors by any combination of last name, first name, second name, organization name, address, phone, city, state, zip, other name, and ID number. DonorQuest is not case sensitive, which means that it does not matter whether or not you correctly capitalize the name you wish to search for. For example, if you are searching for a donor by the last name of "Hayward", you can enter the name as "hayward" or "HAYWARD" or even "HaYwArD" and the search will yield the same result.

The third and most flexible and simplest way of searching is with the Flex Find feature if you have it enabled under User, Change Your Personal Settings. It's a bit like a Google search, providing just one simple search blank, but using very smart methods internally to figure out what you're looking for. You can use partial names with it in any order, a donor ID number, bit of an address, etc. If you are new to DonorQuest, we recommend using the Flex Find as your primary method of searching. The other methods allow more control over which columns are searched, but most of the time you can just let DonorQuest take care of that decision automatically with the Flex Find.

Setting Up Your Data for Streamlined Querying and Reporting

On the Constituency tab of the Main Information Form you will find ten List fields. List fields help you categorize your donors, enabling you to query the database for people who belong to one or more special groups (each defined by you). Here's an example for coding donor Justin Hayward as a Board member:

1. Move your mouse to the List code fields and position your cursor in the first empty List box.
2. Click on the drop-down arrow to the right of the field. This will bring up the Code Assistance window that allows you to select a code from the window.
3. Click on BOAR from the available choices.
4. Finally, click the Save button on the Main Information View to save the change:



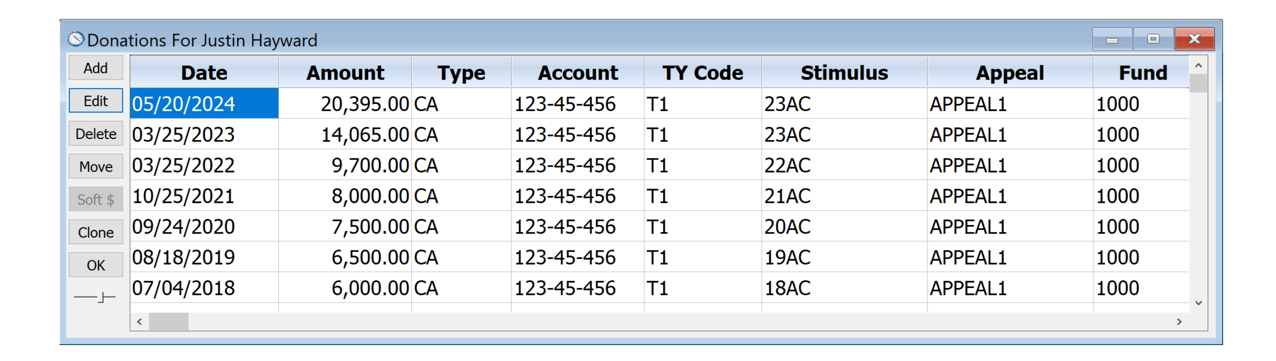
If you know a code, you can also simply type it instead of using the drop-down menu. When typing a code, press the tab key after you have entered it so that it can be validated. You may also type a partial code (just the first few letters) and press the down arrow until the correct code appears.

For more details about the buttons on the Main Information form and a description of all the data fields it offers, please refer to the main topic on Entering Donor Information and the Header Table topic.

5.4 Gifts Button



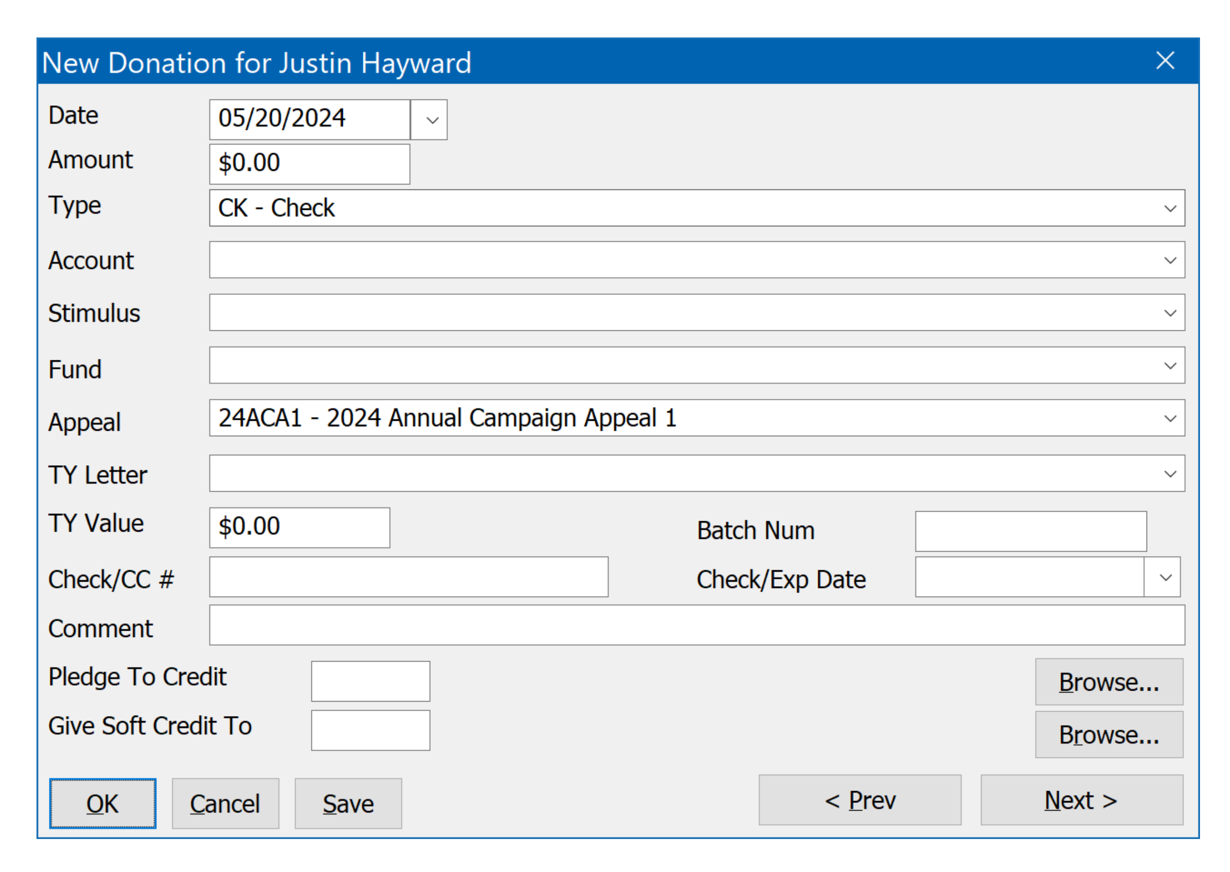
Clicking the Gifts button on the DonorQuest toolbar will open the Donations datasheet. Note that Gifts in DonorQuest are normally referred to as Donations, but the term Gift may be used on a display where space is at a premium (such as the toolbar). Having the Donations datasheet open is essential for viewing and editing past donations, as well as adding new ones. The donations datasheet will show you all donations for the donor currently highlighted in the Main Information datasheet. For example, highlighting the sample donor Justin Hayward would show the following history in the Donations datasheet:


Donations For Justin Hayward

Date	Amount	Type	Account	TY Code	Stimulus	Appeal	Fund
05/20/2024	20,395.00	CA	123-45-456	T1	23AC	APPEAL1	1000
03/25/2023	14,065.00	CA	123-45-456	T1	23AC	APPEAL1	1000
03/25/2022	9,700.00	CA	123-45-456	T1	22AC	APPEAL1	1000
10/25/2021	8,000.00	CA	123-45-456	T1	21AC	APPEAL1	1000
09/24/2020	7,500.00	CA	123-45-456	T1	20AC	APPEAL1	1000
08/18/2019	6,500.00	CA	123-45-456	T1	19AC	APPEAL1	1000
07/04/2018	6,000.00	CA	123-45-456	T1	18AC	APPEAL1	1000

Adding A New Donation

Once positioned on the donor you would like to add a new donation for, click on Add button in the Donations Datasheet Window. This will open the Donation Add Form. As the Donation Add form appears, notice that the title of the window will have the name of the donor you are adding the new donation for. Also, the donation date automatically defaults to today's date. When adding a donation for the sample donor Justin Hayward, the donation form would look like this:



Notice that the Donation Type defaulted to CK for check. You can set the default values for new donations to those you most commonly used to save data entry effort. You can always change the defaults for any new donation. To set the donation defaults, click on Configure, Donation Default Field Values. Your default values are specific to your

DonorQuest account, so they will not interfere with those of other DonorQuest users.

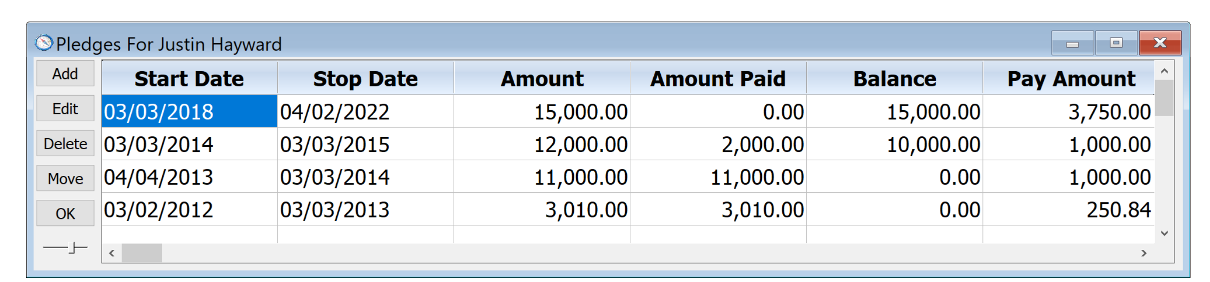
To continue with our exercise, tab down to the donation amount and enter $100 (dollar sign not necessary). Press the Tab key again and you will see DonorQuest format the amount. The default is CK for check, but the Donation Type can be many things including cash, check, Visa, MasterCard, etc. DonorQuest also supports in-kind gifts such as LB for Pounds, or HR for Hours. These in-kind gift amounts will not be counted in the donor's dollar totals. As with all coded fields in DonorQuest, you can setup new codes which suit your organization's needs. The Donation Date, Amount, and Type fields are the minimum required to create a new donation. So we can now complete our new donation add by clicking OK. You will see the new donation added to Justin Hayward's history in the donation datasheet display. The Save button is similar to Ok. It will save the donation without closing the donation form, allowing you to make additional changes before finally clicking Ok to save and close. The Cancel button will cancel all changes you just made in the form, but it will not delete an already saved donation. If you click Cancel before clicking Save on a new donation, the donation will not be created.

While the other donation fields are optional, they can be very important depending on what sort of information your organization would like to track about donations. For a detailed description of the other donation fields, please refer to the Donations Table.

5.5 Pledges Button



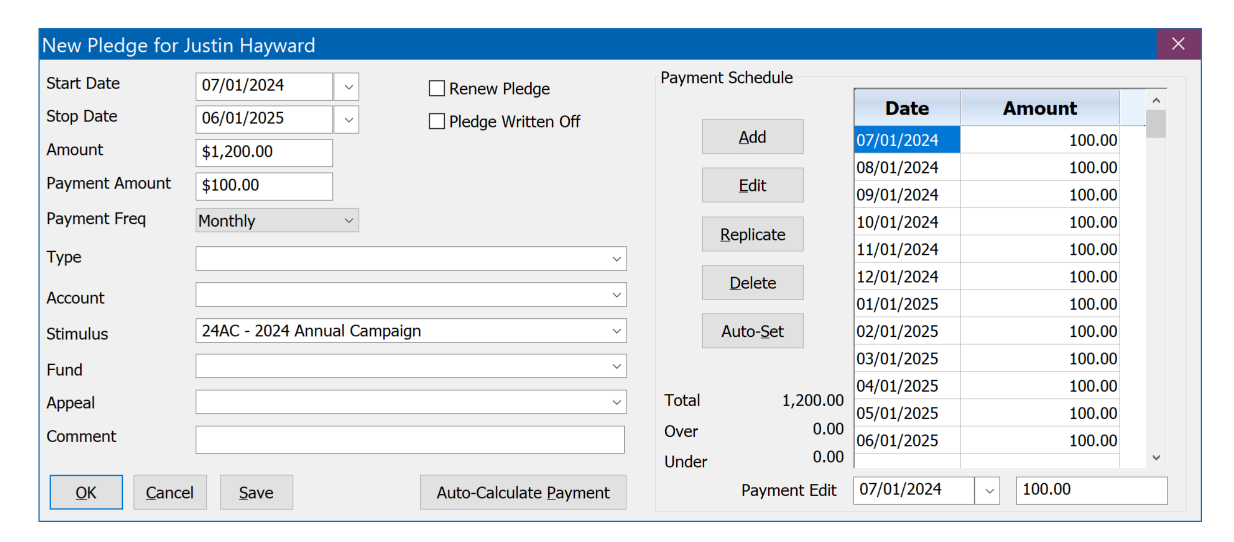
Pledges are promises to pay over time. DonorQuest will completely manage the life cycle of a pledge, including sending automatic payment reminders to donors who have active pledges with a balance still due. In DonorQuest, a donor may have any number of active pledges, each with potentially different payment plans. DonorQuest has full pledge billing support, and each pledge bill (or reminder statements as they are more commonly referred to) contains complete information about a specific donor's active pledges -- how much they have pledged, how much they have paid so far, the remaining balance, the payment amount currently due, etc. These pledge reminder statements can be run whenever you wish, and DonorQuest will even print the mailing labels or envelopes to mail them with! Clicking on the Pledge button on the DonorQuest toolbar will bring up your Pledges datasheet window as follows:



Start Date	Stop Date	Amount	Amount Paid	Balance	Pay Amount
03/03/2018	04/02/2022	15,000.00	0.00	15,000.00	3,750.00
03/03/2014	03/03/2015	12,000.00	2,000.00	10,000.00	1,000.00
04/04/2013	03/03/2014	11,000.00	11,000.00	0.00	1,000.00
03/02/2012	03/03/2013	3,010.00	3,010.00	0.00	250.84

Adding A New Pledge

Once positioned on the donor you would like to add a new pledge for, click on Add button in the Pledges Datasheet Window. This will open the Pledge Add Form. As the Pledge Add form appears, notice that the title of the window will have the name of the donor you are adding the new pledge for.



For our example, let's say donor John Lennon wants to pledge a gift of $1,200 to be paid over the course of a year in monthly payments. In our example, we will use a date range of 03/01/2017 through 03/01/2018. As a practice, go ahead and begin a new pledge with that time range. Then enter $1,200 for the amount. Then click on the Auto-Calculate Payment button. You will see DonorQuest automatically set's the monthly payment amount to be $100. If you had chosen a different payment interval for the Payment Frequency of the pledge (such as quarterly or yearly), then the payment amount would be different. All that is essential to defining a pledge is the time range, pledge amount, payment amount, and payment frequency. However, DonorQuest also supports irregular pledge payment schedules in which you can setup exact payment dates and amounts. To give you a head start when you want to do this, click the Auto-Set button in the Payment Schedule area on the right-hand side of the pledge window. This will set regular payments based on the time range, pledge amount, payment amount, and payment frequency information you have entered. You may then customize the payment dates and amounts, which must all total to the full amount of the pledge. If you do not set anything for the Payment Schedule, regular payments are assumed on all of the DonorQuest pledge payment reminded reports sent to donors with any outstanding pledges.

As payments for active pledges come in, they are entered as donations and linked to the corresponding pledge. As payments are made, DonorQuest will adjust the amount paid and remaining balance for each pledge.

While the other pledge fields are optional, they can be very important depending on what sort of information your organization would like to track about pledges. For a detailed description of the other pledge fields, please refer to the Pledge Table.

5.6 Memos Button



Memos are convenient for making short notes about key interests or attributes of a donor's profile. As with donations and pledges, each donor may have an unlimited number of memos. Note that the memo facility is not intended for lengthy paragraph-oriented notes about the donor. Such information should be entered in the donor's Notepad. The memo facility also provides the easiest way to create user-defined fields, since the fields are immediately available in the memo window, they only appear for donor's who need them, and they may be easily queried and included in custom reports. Using the memo facility for user-defined fields is fairly informal, because the memos can only store textual information. DonorQuest also supports a more formal style of user-defined field in which you can have control over the data type of the field, as well as whether it is coded or not. Please see user-defined fields for more information about this.

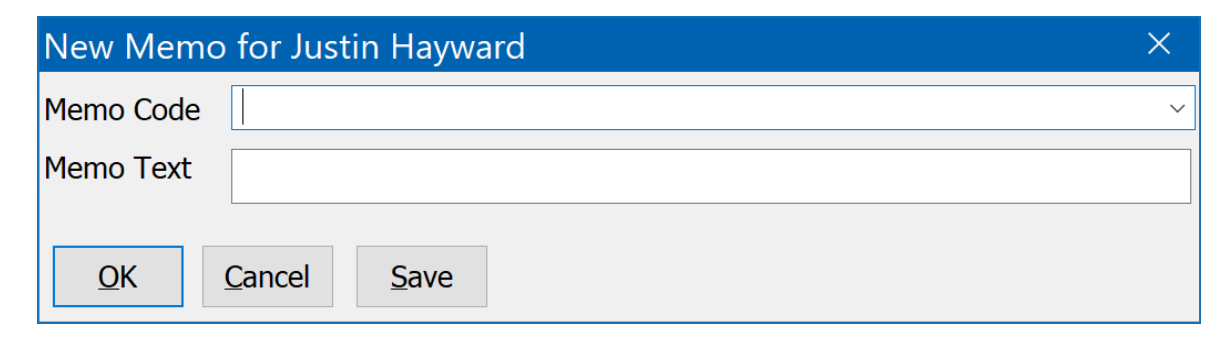
Clicking on the Memo button on the DonorQuest toolbar will bring up the Memo datasheet window as follows:



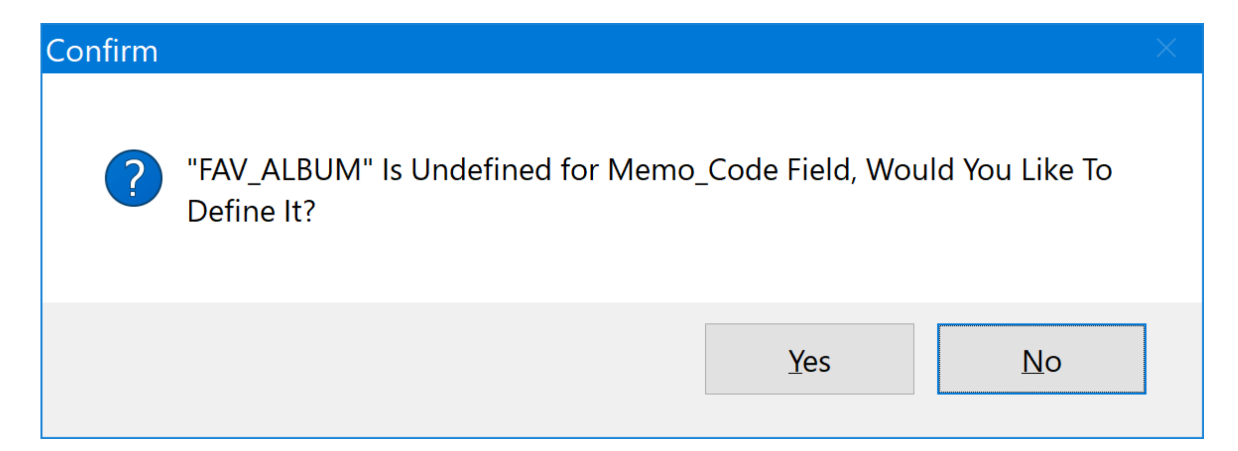
So basically a memo consists of two parts -- a code defining what the memo is, and then the memo itself. The code serves as the name of a user-defined field, and may be up to ten characters long. The memo itself is a simple line of text, up to one hundred characters in length. New memo codes may be created at anytime. Once you create a new memo code, it will be available for use with other donor accounts, and it will be available for other DonorQuest users to choose from when adding a new memo for a donor. So create new memo codes with care, as you will be sharing their use with other DonorQuest users.

Adding a Memo

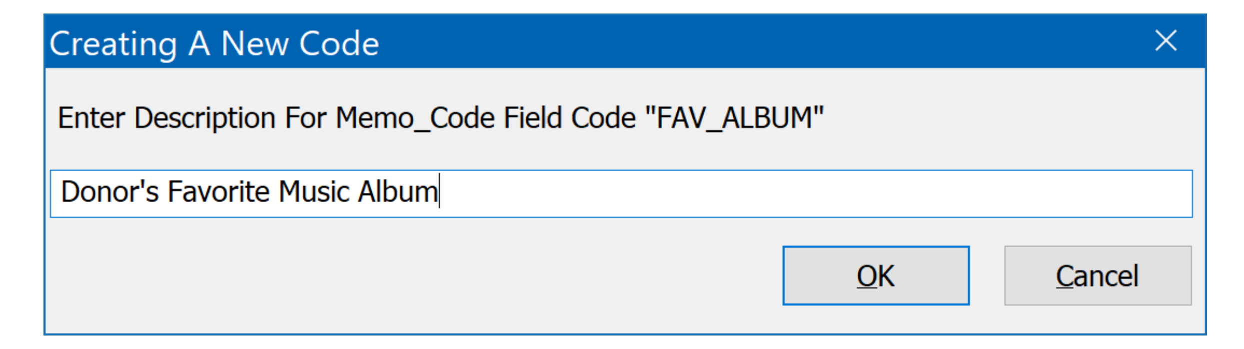
As an example, let's say that for some donors you have a need to store the name of their favorite music album. While you could create a formal user-defined field for this purpose which would appear in all donor accounts, it would be a waste since there are very few donors you need to capture this information for. To create a memo to accomplish this, you could create a new memo code FAV_ALBUM. To do this, first find a sample donor you would like to do this for (we will use the sample donor Justin Hayward), then click on the Add button in their memo datasheet. You will see the memo add form open which looks like this:



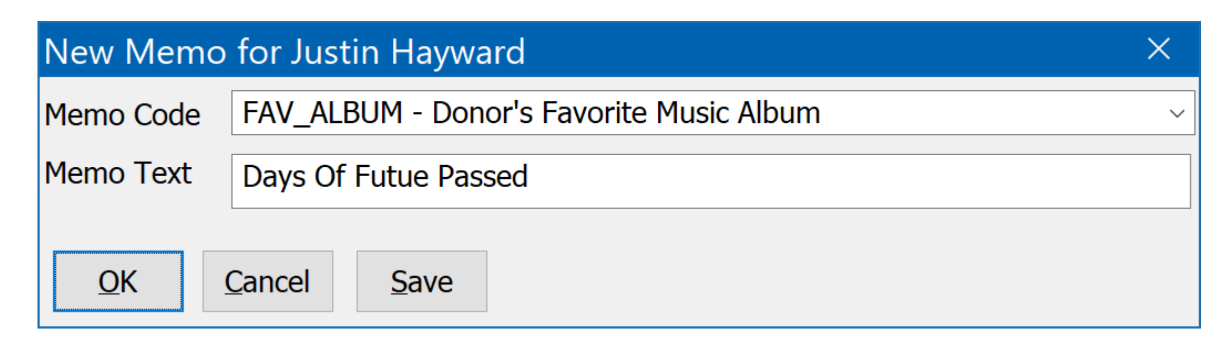
At this point if we would like to use one of the previously defined memo codes (created by you or other users), we could simply click on the drop-down arrow for the Memo Code field and choose from what is already there. If we knew the code we could type the first few letters of it and press the down arrow until the correct code appears, or simply type the complete code straight away and press the tab key to validate it. But in our example we want to create an entirely new memo code FAV_ALBUM. To do this, simply enter the new memo code and press the tab key. You will see the following prompt:



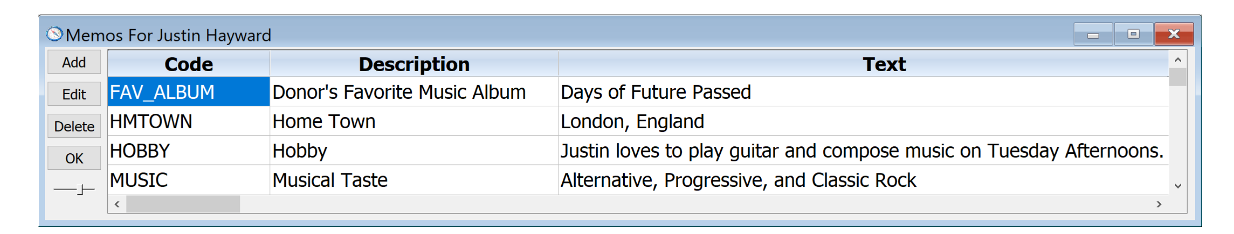
Click Yes, then enter a meaningful description for the new code like this:



Click Ok, and you will see the newly created code along with its description appear in the new memo you are creating. You may now enter the name of the donor's favorite album in the Memo Text field. It should all look like this:



Click Ok, and you will see this new memo added to the donor's datasheet:



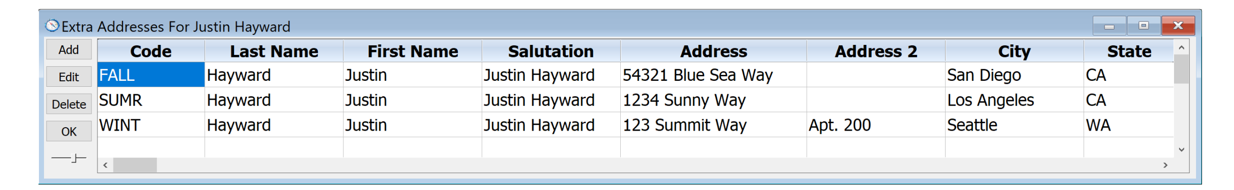
As you may have noticed in the memo datasheet window, there are some additional memo fields beyond memo code and memo text. These fields are maintained by DonorQuest so you do not make any entries for them. For a detailed description of the other memo fields, please refer to the Memo Table.

5.7 Extra Addresses Button



Extra addresses are useful for donors who have a vacation home or seasonal address. With your reports and labels set up correctly, the start and end date fields of extra addresses allow DonorQuest to automatically select the correct address based on the date of the mailing. Donors can have an unlimited number of extra addresses. You may also use extra addresses for storing additional addresses which you would like to have for reference, but which you do not plan to have DonorQuest to automatically substitute for any mailings. For example, extra addresses may also be used to store the names of multiple contact people at an organization. This can be done by simply leaving the date range for which the extra address is valid blank. Extra addresses may also be used to store archived versions of past addresses for the donor. When you click on the Archive Address button of the Main Information Form in DonorQuest, the donor's current main address will be copied to a new extra address, creating an archival copy. You may then update the donor's main address as needed, knowing that a copy of their previous address exists for reference as an extra address. The Flex Find feature of the Main Information window in DonorQuest also searches extra addresses, so the donor's record will still be found if you search on one of their past addresses.

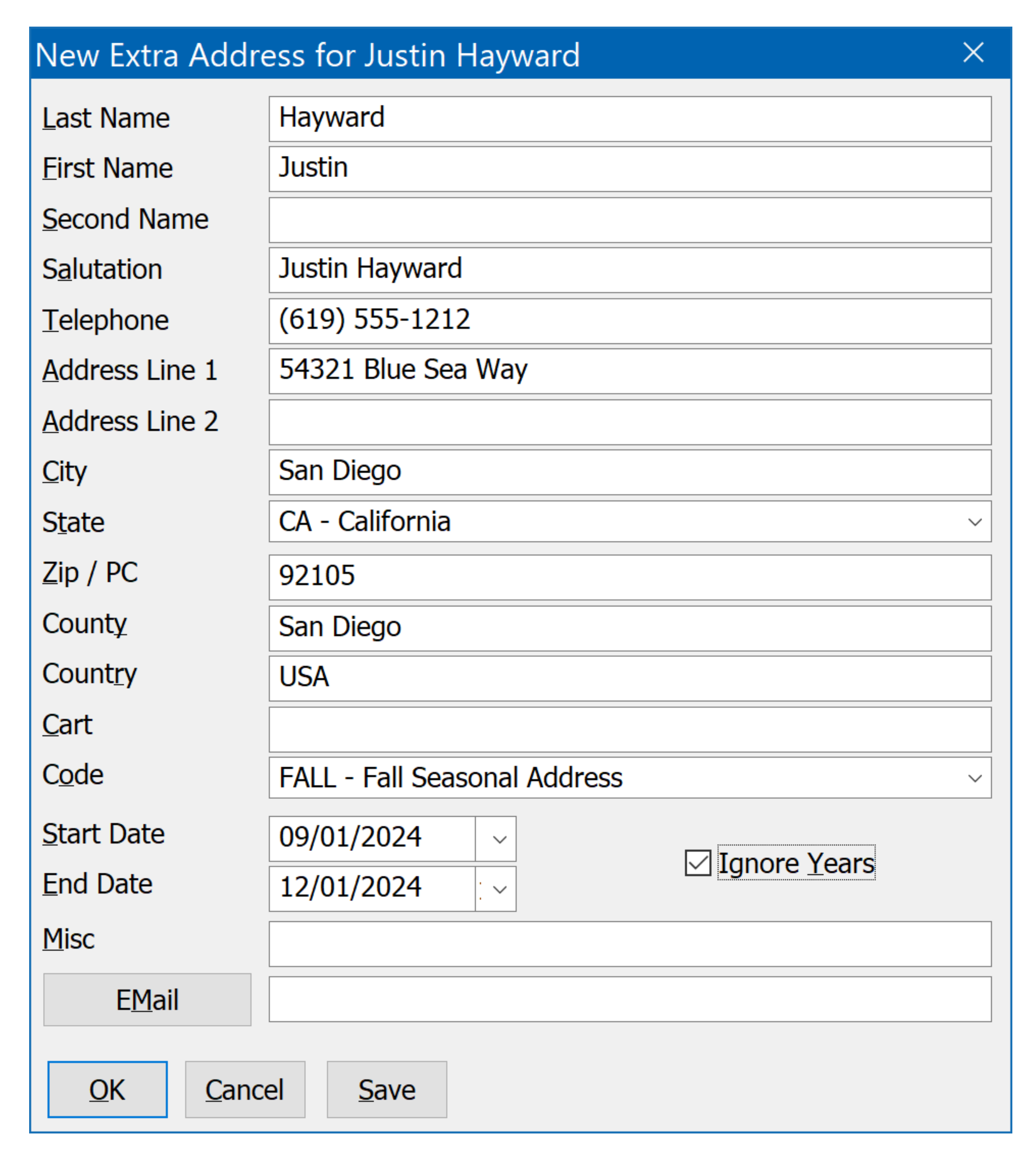
Clicking on the Extra Address button on the DonorQuest toolbar will bring up the Extra Address datasheet window as follows:



Code	Last Name	First Name	Salutation	Address	Address 2	City	State
FALL	Hayward	Justin	Justin Hayward	54321 Blue Sea Way		San Diego	CA
SUMR	Hayward	Justin	Justin Hayward	1234 Sunny Way		Los Angeles	CA
WINT	Hayward	Justin	Justin Hayward	123 Summit Way	Apt. 200	Seattle	WA

An Extra Address entry duplicates the main biographical address fields, including the first and last name fields to account for a couple with a joint donor account possibly having different addresses based on the time of the year, depending on their work assignments. When the Extra Address datasheet is active, you can create a new Extra Address for the current donor by clicking the Add button. As an example, we will add a new Summer Extra Address for the sample donor Justin Hayward.

Begin by finding sample donor Justin Hayward's record, then click the Extra Address button on the DonorQuest toolbar to open the Extra Address datasheet. Resize the newly opened Extra Address window to your taste, or use one of the Window, Tile... options. Finally, click on the Add button of the Extra Address Datasheet, then enter the following:



As with the Main name and address entry in DonorQuest, you may omit the city, state, and county fields, entering simply the zip code and pressing the Tab key. DonorQuest will automatically fill in the city, state, and county fields for you.

Once you have the Extra Address ready to save, click Ok to save the contents of the Extra Address form and close it. You will then see the Extra Address datasheet update to show the new extra address.

Here's a brief discussion of the fields which are essential for creating a valid Extra Address:

Salutation

As with Salutation 1 for the main biographical record, the Extra Address Salutation is essential because it is used on the first line of the address block. The Extra Address First and Last Name fields are for reference purposes only and are not actually used to form the address for mailing labels and such -- that's the purpose of the Extra Address Salutation. This allows for maximum flexibility in specifying exactly how a donor is to be addressed with any required title, suffix, and any possible spousal inclusion for the case of a couple. It is the begin all, end all for how the donor sees their name on correspondence, so you can make it appear exactly according to any particular preferences they have.

Address, City State, Zip

These are of course required.

Start and End Date

These date fields define the period of time for which the extra address is valid and mail may be redirected there. They can either represent a specific period in time which happens only once, or they can represent a yearly recurring window of time. If the extra address will be valid in subsequent years for the same months and days, turn on the Ignore Years checkbox. While valid dates are always required, if the Ignore Years checkbox is on, it really does not matter what years you use in the date range.

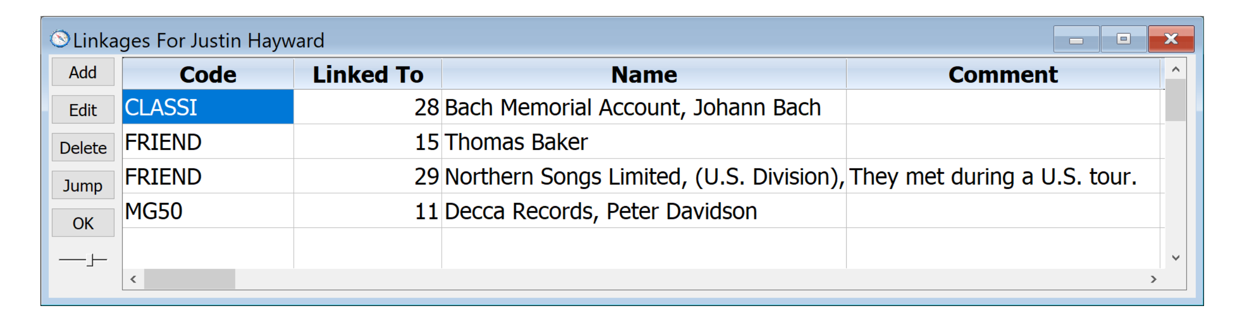
All of the Extra Address fields are covered in detail in the Extra Addresses Table topic.

5.8 Linkages Button

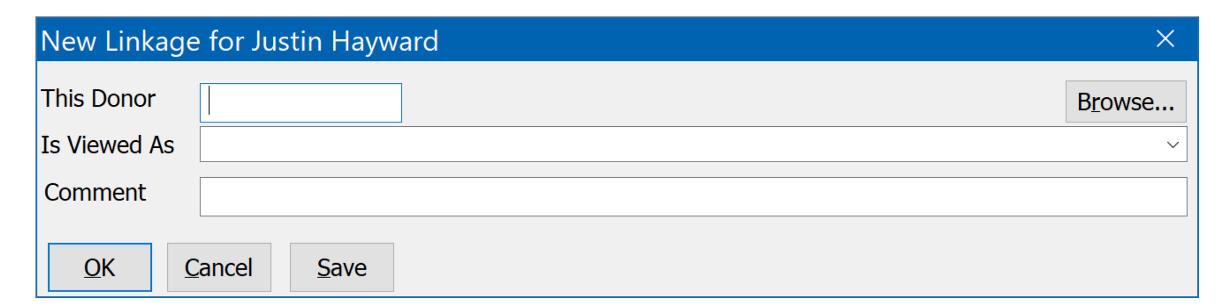


Linkages are used to establish relationships or connections between donors. Through the use of Linkages you may create individual solicitor lists, report on all those who attended a related institution or event, denote familial relationships, employer-employee relationships, and so on. Each donor may have an unlimited number of Linkages (relationships) with other donors.

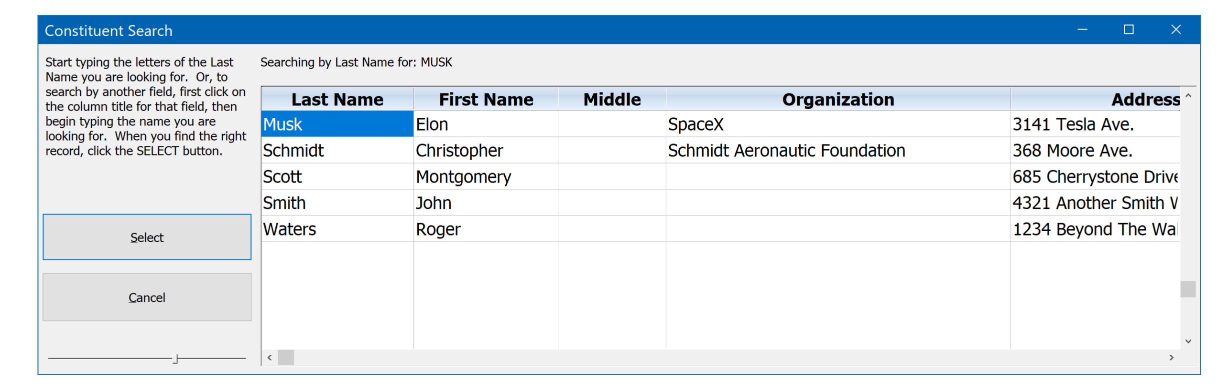
Clicking on the Links button on the DonorQuest toolbar for the sample donor Justin Hayward will bring up the Linkages datasheet window as follows:



As with Donations, Pledges, and the like, clicking on the Add button on the datasheet window will allow you to add a new linkage. Let's do one for practice. Look up the sample donor Justin Hayward and open his Linkages datasheet, then click Add. You will see the following form:

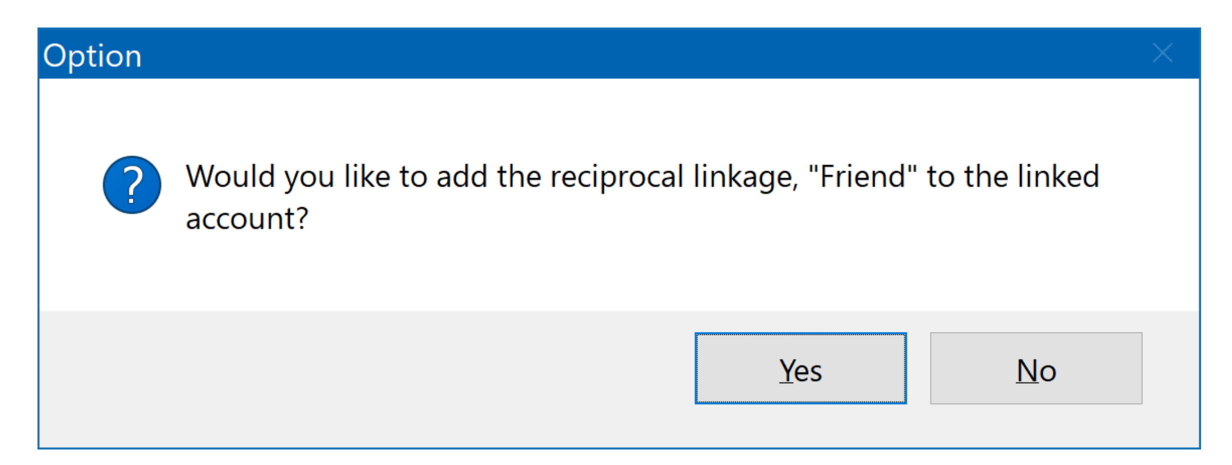


A linkage basically consists of two things -- the ID of the donor you are linking to, and how they are viewed by the donor you are adding the linkage for. For our example, let's add another friend for Justin Hayward. If you happen to know the ID number of the friend you could enter it, but chances are you don't. So you will click on the Browse button of the New Linkage form. You will then see a browse window which looks like this:



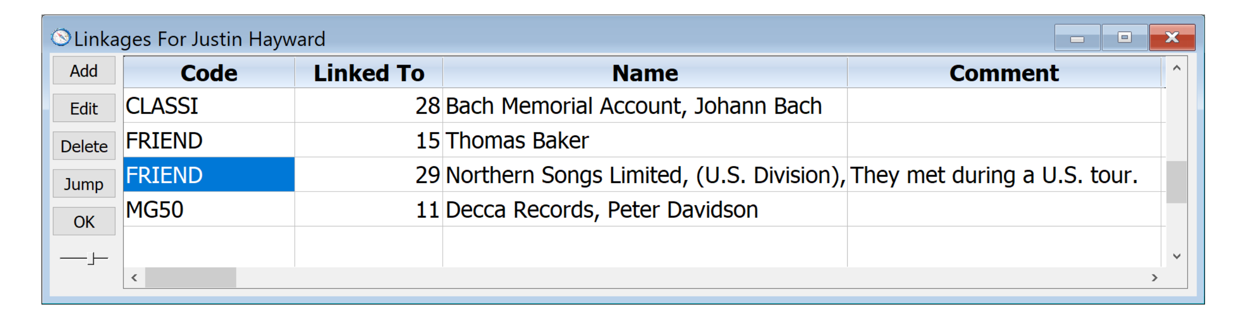
This is a special search window which is all set to help you find the ID of Justin's friend. You can simply begin by typing the letter's of the friend's last name. Let's say the friend we are searching for is John Lodge. Just begin typing the letters of Lodge. You will see the display update as DonorQuest narrows down the list to the name you are looking for (note that if we had needed to search by any of the other columns we could have by first clicking on the title of the column we want to search to order the data by that column). Once the record for John Lodge is highlighted, click the Select button of the Browse Find window. You will see that the ID number for John Lodge is automatically entered for you in the New

Linkage form. Press the Tab key to move on to the Is Viewed As blank and click the drop-down list. From there you can select the code FRIEND. Complete the entry by clicking Ok on the New Linkage window. You should see:

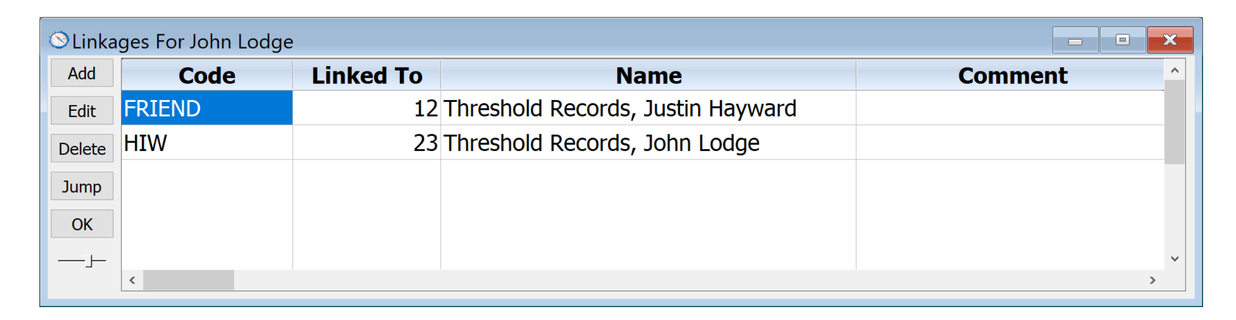


Click yes. What this means is that DonorQuest knows that if John is a friend of Justin's, it stands to reason that Justin is also a friend of John's, so DonorQuest is asking to automatically add a linkage in John's account back to Justin. DonorQuest knows which types of relationships are reciprocal in nature because you are able to tell it which relationship codes do in fact have reciprocals. Sometimes, as in this case, the reciprocal code would be the same - FRIEND. But in the case of adding an employee to the donor record of a company, there would still be a reciprocal relationship, but the code would be different -- one would be EMPLOYEE, and the other EMPLOYER. You can setup these reciprocal relationships in DonorQuest in advance, so it knows how to behave when adding certain types of linkages (see setting up code tables for more information on this).

So back to our example. You should now see that the Linkages datasheet display for Justin now includes a link to his friend John Lodge of Threshold Records, as shown here:



This is a good opportunity to explore the Jump button. Quite simply, the Jump button will take you to the linked donor account. Give it a try. With the John Lodge friend linkage highlighted in Justin Hayward's Linkages datasheet, click the Jump button. You will see that you are immediately taken to the donor account for John Lodge, and there you should see the reciprocal linkage back to Justin's account, like this:



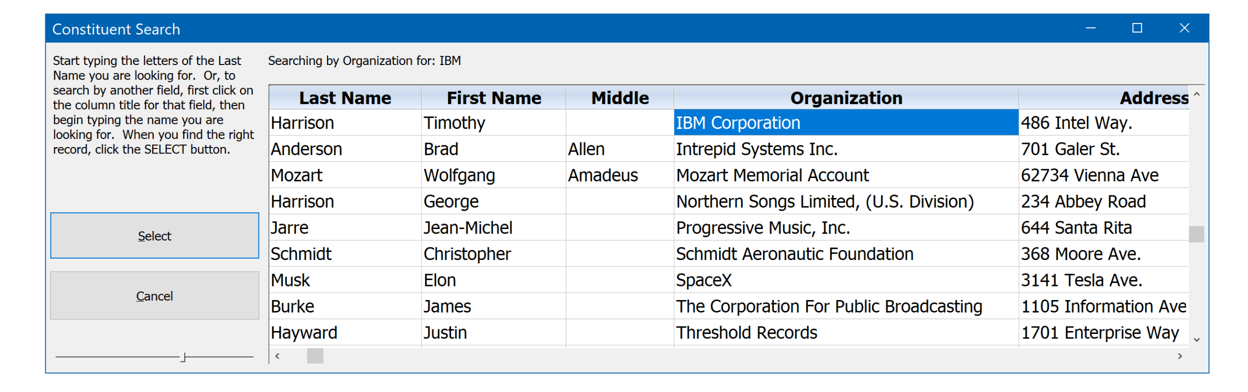
Now click the Jump button again -- you're back on Justin's account!

Matching Gifts

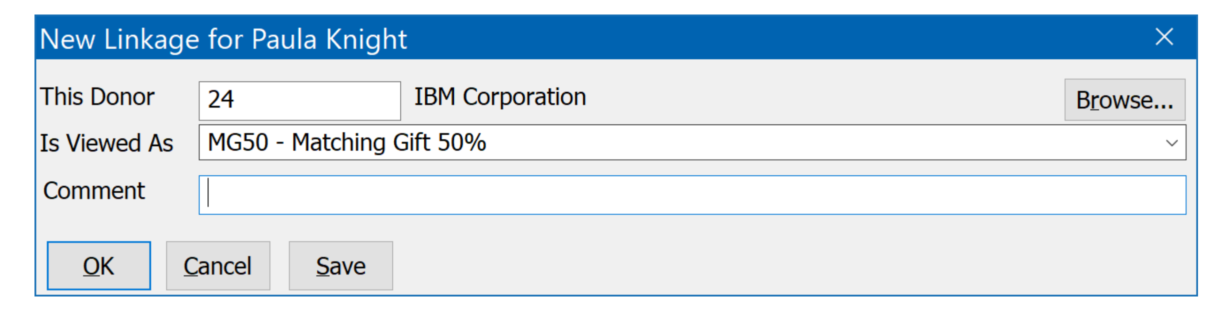
Donor Linkages are also used to establish matching gift relationships for your donors. In order to designate a matching gift account for the current donor, start by adding a new Linkage, then use the Browse button to select the company record that will match the donor's gift. Then type into the Is Viewed As, MG which stands for matching gift, followed by a number from 1..100 that specifies the matching percentage. Now, every time the donor gives, a matching pledge will be created in the account of the matching gift donor.

For example, if IBM Corporation agrees to match any gift given by donor Paula Knight at a rate of 50%, you would add a Linkage to Paula's account of MG50, with the linked donor being the Donor ID number for IBM Corp. Here are the steps using the sample database:

1) Look up Paula Knight's account and open the Linkages datasheet.
2) Click the Add button on the Linkages datasheet, then click the Browse button to find IBM's record
3) Since you want to search the Browse window by Organization, click on the title of the organization column to order the data that way.
4) Begin typing IBM. Very quickly you should land on IBM's record, and it should look like this:



5) Click Select. Now for the Is Viewed As type MG50 and press tab. It should look like this:



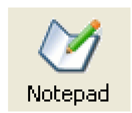
6) Click Ok to save the new Matching Gift Linkage.

Now whenever a donation is entered for Paula, you will be asked if it is okay to create a matching gift pledge in IBM's account for 50% of the gift. If you say yes, and you run the automatic pledge invoices in DonorQuest, IBM will automatically get a pledge payment reminder in the mail explaining what they owe and why (details of Paula's donation will show on the payment reminder). Give it a try!

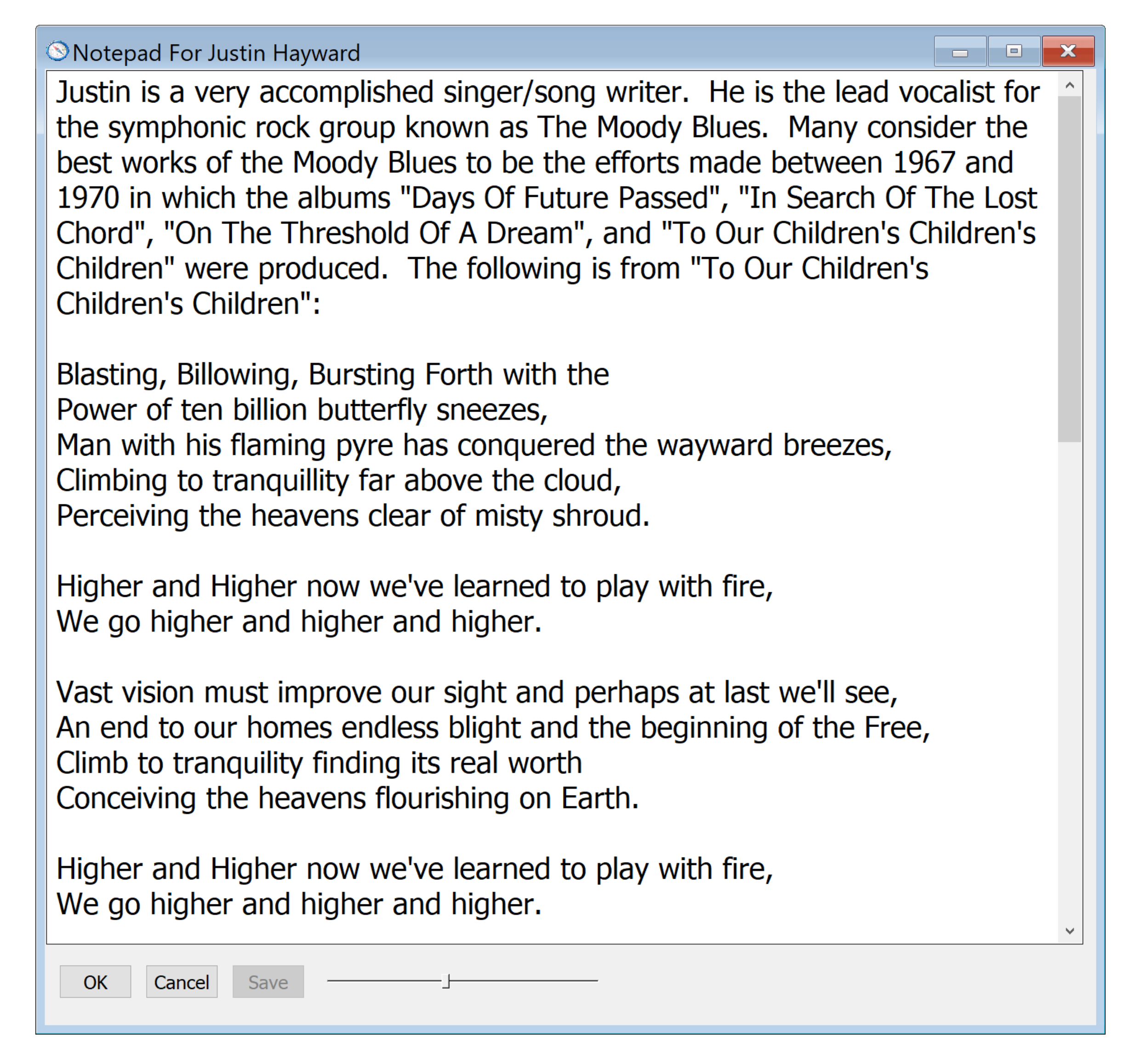
Note: Be sure you have the option for Prompt For Pledge Linkage turned on under User, Change Your Personal Settings.

There are additional details about the linkage fields in the Linkages Table topic.

5.9 Notepad Button



The DonorQuest Notepad is for storing free-form notes about each donor in paragraph form. While the Notepad is accessed on the toolbar like the datasheet windows and exhibits some datasheet properties (such as the ability to be resized), it is really a form in that it allows direct edit changes. The full text of all Notepad entries across all donors is available for keyword searches during selections, and you can also include each donor’s Notepad text on any report. So the Notepad is really just a single data field belonging to the donor's main biographical record. But it is very special in that it is a field with no length limitations, which can hold paragraph-oriented text. Here is what it looks like:



The Notepad is suitable for any miscellaneous biographical information you want to enter about a donor in narrative form. You can also copy and paste text into it from other sources. For example if a donor is politically active in your community, you might copy and paste public information you find about him online here for quick reference. Note that the outcome of formal contacts you have with the donor over time (such as email exchanges) could also be stored here, but they are really more appropriately placed in a DonorQuest contact record (see Scheduled Contacts). Each scheduled contact has its own Notepad space, and a donor can have any number of contacts, but they only have one main Notepad.

The horizontal slider shown next to the Save button in the NotePad window is used to adjust the point size of the Notepad text.

5.10 Scheduled Contacts / Grants

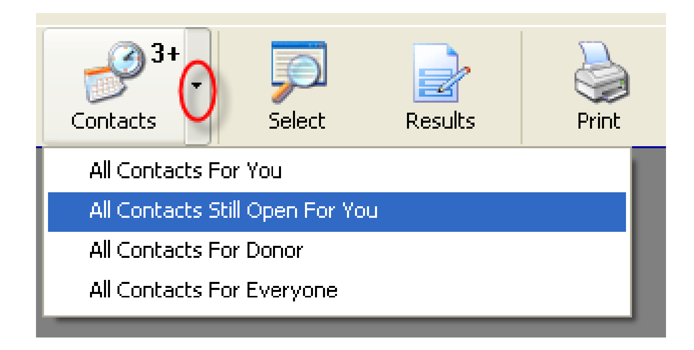


The DonorQuest contact manager allows you to schedule donor contacts for yourself, or for other DonorQuest users. A Scheduled Contact is essentially a planned interaction between a donor and an individual within your organization. The individual within your organization must be a DonorQuest user and have a DonorQuest user account in order to participate in this feature. If you have enabled contact reminders in your personal DonorQuest settings, then each day when you start DonorQuest you will be reminded if you have Scheduled Contacts for the day, and of any open (unresolved) contacts from the past. The Contacts icon on the DonorQuest Tool Bar will also display this information for quick reference. For example, if you have three open contacts for today, and one or more open contacts from the past which need attention, the Contacts icon will look like this:



The plus (+) symbol following the count of open contacts for today indicates that you also have one or more contacts from the past which need attention. These indicators are constantly updated, so if another user were to add a new contact for you which you need to take care of today (such as calling a particular donor), the contacts icon would immediately update to reflect that, and you could choose the All Contacts Still Open For You view to see the details.

The scheduled Contacts button also features a pop-up menu of options to allow you quick access to the different ways of seeing your contacts. These options are also available on the main Donor, Scheduled Contacts / Grant Tracking menu, but they are quicker to get to on the integrated pop-up menu. Simply click on the down pointing arrow on the right side of the Contacts icon to launch the contacts view menu, like this:

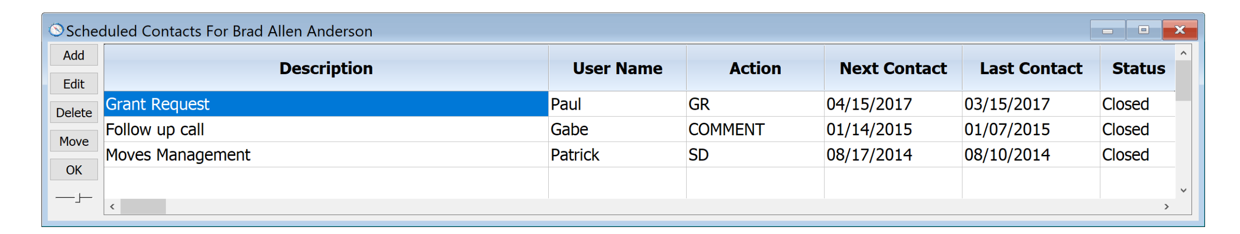


The contact manager is also a good place to store detailed notes about specific interactions you have had with a donor -- such as a phone conversation or an email exchange. New contact records can be created and closed immediately for the sole purpose of documenting an interaction you just had with a donor. And since each contact

entry has a completely separate notepad space allowing for unlimited paragraph-orient text entry, you could copy and paste an entire email exchange into a single contact entry to have available for keyword searches and reporting in DonorQuest.

Each contact record also has a Grant Management component. The date-driven nature of contacts makes them an idea place to house your grant acquisition attempts.

Here is what the Scheduled Contacts datasheet looks like for sample donor Brad Anderson:



At it's core, a contact basically consists of a brief description, who in your organization is managing it, what action needs to be taken, and when. You can setup new contacts for yourself, and for other DonorQuest users in your organization. Each time you open DonorQuest, it will let you know if you have any contacts that need to be dealt with today, and also if you have any contacts from the past which are still open and needing follow-up. The Donor, Scheduled Contacts / Grant Tracking menu in DonorQuest allows you to see at a glance all of your contacts past and present, or just your open contacts, or just the contacts for the current donor record, or all contacts for all people in your organization. Ownership of an existing contact may be transferred to another user in your organization by editing the contact and changing the user name associated with it. With very important donors, having the personal touch and good follow-up can make all the difference, and that's what the DonorQuest contact manager is designed for.

Let's setup an example contact between yourself and the sample corporate donor Intrepid Systems. Let's say you would like to invite your main contact there, Brad Anderson, to your upcoming thank-you dinner for major donors. You would start by using the DonorQuest Find feature to search directly for the Intrepid Systems donor record, or you could search for Brad Anderson by name since you know he is the main contact there. Once on the Intrepid Systems record, click on the Add button of the Scheduled Contacts datasheet. Fill in the following information in the New Contact form:

Contact for Intrepid Systems Inc., ID: 32

Contact Description: Calling to invite Brad to our major donor thank-you dinner.

Action: CB - Call Back

User: Paul   Last: 02/15/2024   Next: 02/23/2024   Open   Closed

Contact Notes

02/15/2024: Called Brad but got his voicemail. Before transferring me the receptionist said this is a very busy week for him, but that things will be slowing down a lot next week. I left a message inviting him to our major donor thank-you dinner next Friday. I said that I understand he is very busy but we would love to have him and I'll check in one more time with him next week to see how things are going. I think it would be best to try him one more time on the 23rd, just a couple days before our dinner, so I will set my next contact date to the 23rd so DonorQuest will remind me when I come in that morning to give Brad another call.

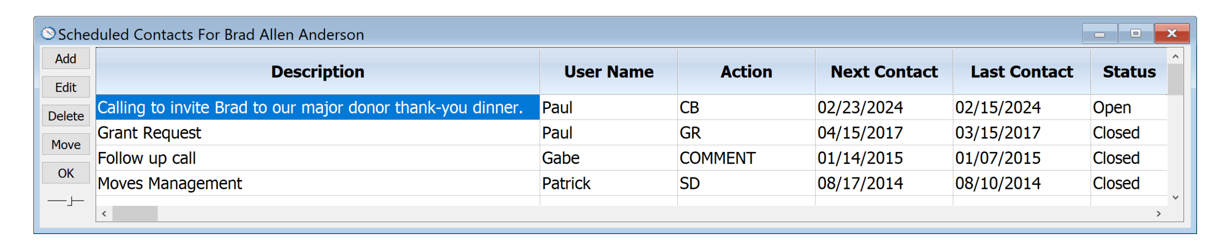
Grant-Specific Information

Grant Type:
Request Made:
Request Acknowledged:
Decision Made:
When Payment Is Due:
Grant Status:
Amount Requested: $0.00
Amount Granted: $0.00
Actual Amount Paid: 0.00
Donation Payment Link:

OK | Cancel | Save | < Prev | Next > | Set Dates

Note that if you are logged into DonorQuest as Guest, that will be the user name DonorQuest will automatically assign to the contact. If you already have a DonorQuest account and are logged in under your name, it will appear there instead. You also have the option of assigning a new contact to any other person in your organization with a DonorQuest account by clicking the drop-down list next to User, and choosing another user name. But keep it on Guest (or your actual user name) for the purposes of our example.

Click Ok to save and close the New Contact form, and you should now see your new entry in the Scheduled Contacts datasheet view for Intrepid System like this:


Scheduled Contacts For Brad Allen Anderson

Description	User Name	Action	Next Contact	Last Contact	Status
Calling to invite Brad to our major donor thank-you dinner.	Paul	CB	02/23/2024	02/15/2024	Open
Grant Request	Paul	GR	04/15/2017	03/15/2017	Closed
Follow up call	Gabe	COMMENT	01/14/2015	01/07/2015	Closed
Moves Management	Patrick	SD	08/17/2014	08/10/2014	Closed

So now, when the next contact date comes due for this contact, DonorQuest will remind you to follow-up on it. At any time you can see all of the contacts you have open by clicking on Donor, Scheduled Contacts / Grant Tracking, Still Open For You.

Note that in this example we entered specific dates for the Next Contact and Last Contact fields. But often times when you are calling a donor to follow up on an existing contact, you wind up needing to call again. The Set Dates button on the contact form will set the Last Contact date to today's date to indicate that you made an attempt to contact them today, and it will set the Next Contact date to a week in the future -- a typical amount of time to wait before calling again. Of course you can always set the Next Contact date to whatever is appropriate, especially if the donor asks you to call on a specific date. The Set Dates button is just a convenience for the typical case.

For a description of all the data fields in a Scheduled Contact, including those specific to Grant Management, please refer to the Scheduled Contacts Table topic.

Grant Management

Grants are large donations typically made by corporations and foundations. But they take some work to get -- and a lot of follow-up with corporate and foundation contacts. That's why Grant Management fields are a perfect fit for the contact manager in DonorQuest. The contact manager has a group of fields specifically dedicated to acquiring and fulfilling a grant. You probably noticed them when you were adding the sample contact above. The sample corporate donor, Intrepid Systems, has a grant entry with a description of "Grant Request." If you double click on it, you will see the grant specific information in the contact record:

Contact for Decca Records, ID: 11

Contact Description: Grant Request

Action: GR - Grant Request

User: Patrick Last: 02/15/2024 Next: 04/06/2024 Open Closed

Contact Notes

12/15/23: Ran into Peter at a local PTA meeting. He said we would be good candidates to receive a grant and that I should give him a call after New Year's.

01/02/24: Call back on February 15th to confirm grant approval.

02/15/24: Spoke with Peter, we got the grant! Should give him a call again in a month to thank him and let him know what a huge difference the money made to our organization.

Grant-Specific Information

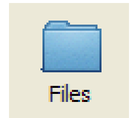
Grant Type	FOUND - Foundation	Grant Status	APPROVED - Approved
Request Made	01/02/2024	Amount Requested	$5,000.00
Request Acknowledged	01/05/2024	Amount Granted	$0.00
Decision Made		Actual Amount Paid	0.00
When Payment Is Due		Donation Payment Link	

OK Cancel Save < Prev Next > Set Dates

There are fields which are used when a grant process is first begun such as the Request Made and Request Acknowledged dates, and then fields to track fulfillment of the grant if it is approved. Notice how these fields work in harmony with the standard contact fields -- especially the Contact Notes section which is used to chronicle all contact events concerning the grant from inception to fulfillment.

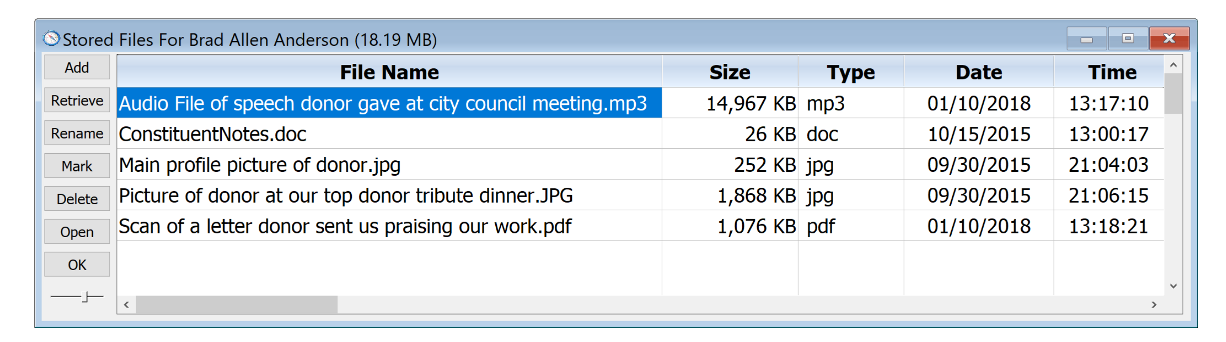
For a detailed description of each grant field, please refer to the Scheduled Contacts Table topic.

5.11 Stored Files Button



The Files button on the DonorQuest toolbar allows you to store and retrieve an unlimited

number of files of any type (i.e. PDF, Word, Excel, Picture, Sound, Video, etc.) in each donor's record. The files are donor-specific and are shown in a standard DonorQuest data grid for each donor, just like donations, pledges, contacts, etc. Stored files may be opened in place by double-clicking on them. They may also be downloaded to your workstation, provided you have the stored file download access right turned on for your user account in DonorQuest. Just as the Donations icon shows the number of donations a donor has, the Files icon shows the number of stored files stored in each donor's account. This allows you to know at a glance whether there are any stored files for the current donor, even when the Stored Files window is not visible. When you click on the Files icon, the Stored Files window will open, which looks like this:



As with all the spreadsheet-style windows in DonorQuest, you may resize this window, as well as move and resize the columns within it. Remember a quick way to get all of your open windows to display optimally on your screen is to use one of the tiling options on the Window menu at the top of the main DonorQuest program window.

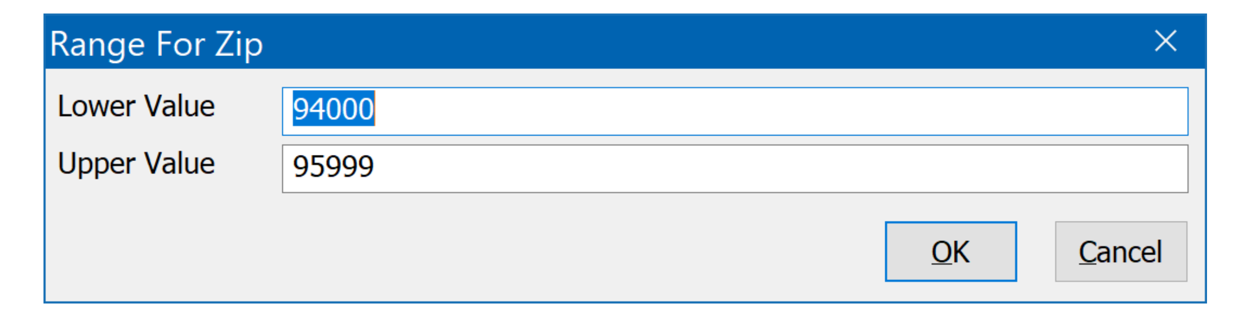
5.12 Creating Selections (Querying)



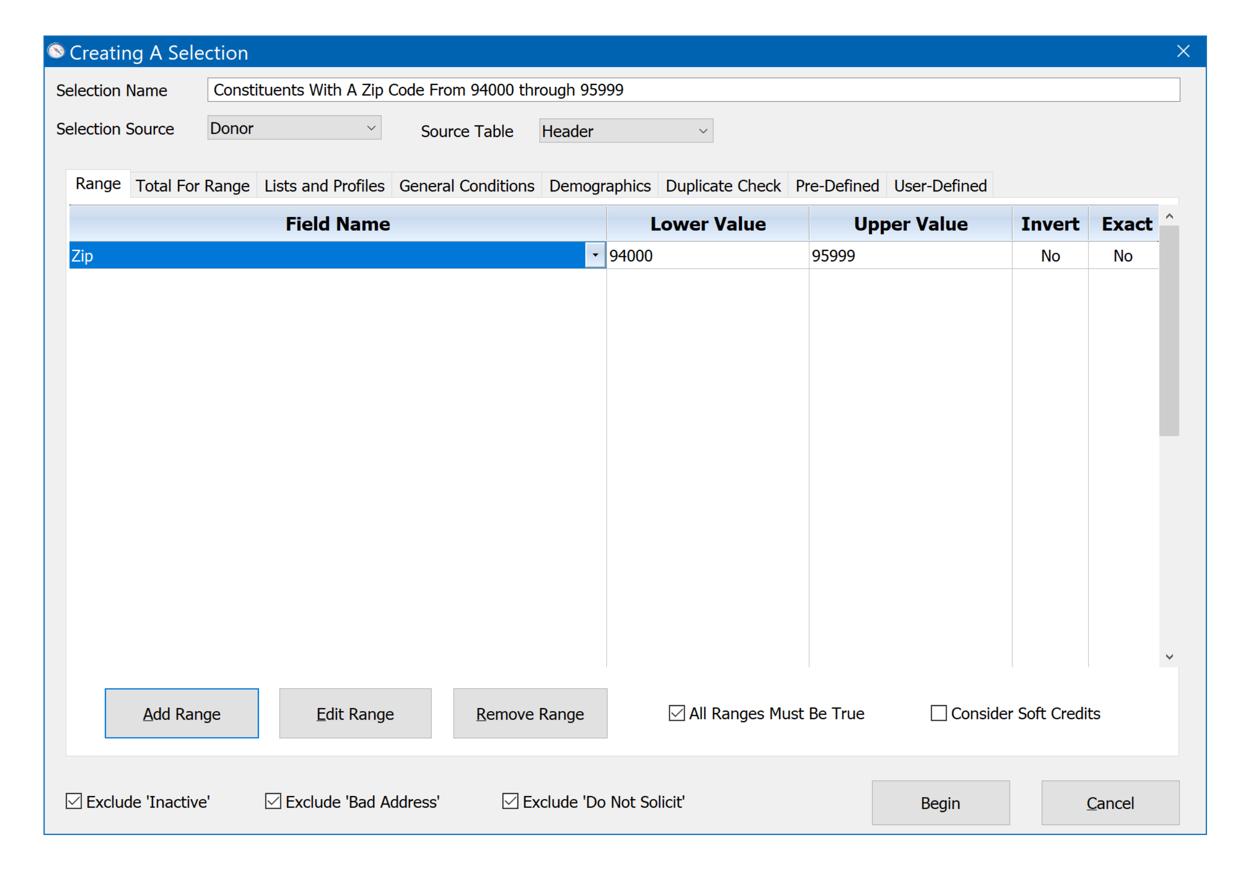
In DonorQuest, database queries are called selections. When a selection is run, the result is basically a list of donors, donations, pledges, etc. which meet the conditions you specify in the selection conditions. It's basically a data filter. Selection results are saved in DonorQuest until you delete them so they can be reused. Selections are fundamental to the design of DonorQuest. A selection is the starting point for many things such as printing reports, printing mailing labels, doing data exports, and performing sweeping data changes.

In this Quick Start Guide, we will run a basic selection to illustrate how the selection process will filter data, then allow you to print the resulting filtered data using one of the many DonorQuest report layouts. For a really simple example, we will select the name/ address records which have last a zip code between 94000 and 95999. Begin by clicking on the Select button of the DonorQuest tool bar. You will see the selection dialog open. Proceed as follows:

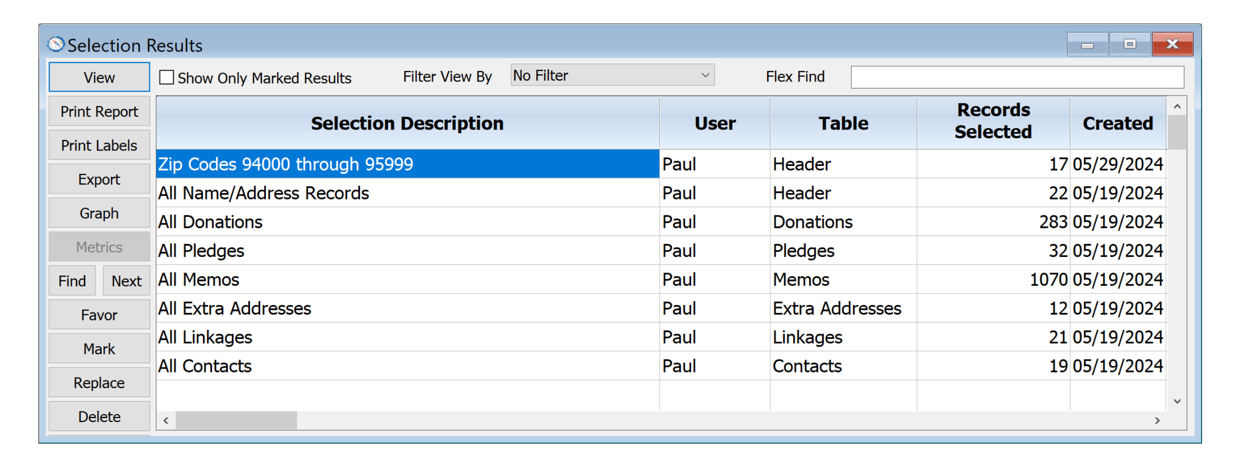
1. Enter "Zip Codes 94000 through 95999" for the Selection Name.
2. Click the drop-down arrow under Field Name and choose the Zip field.
3. Double-Click the Edit Range button, and enter the following:



4. Click Ok. The Creating A Selection dialog should look like this:

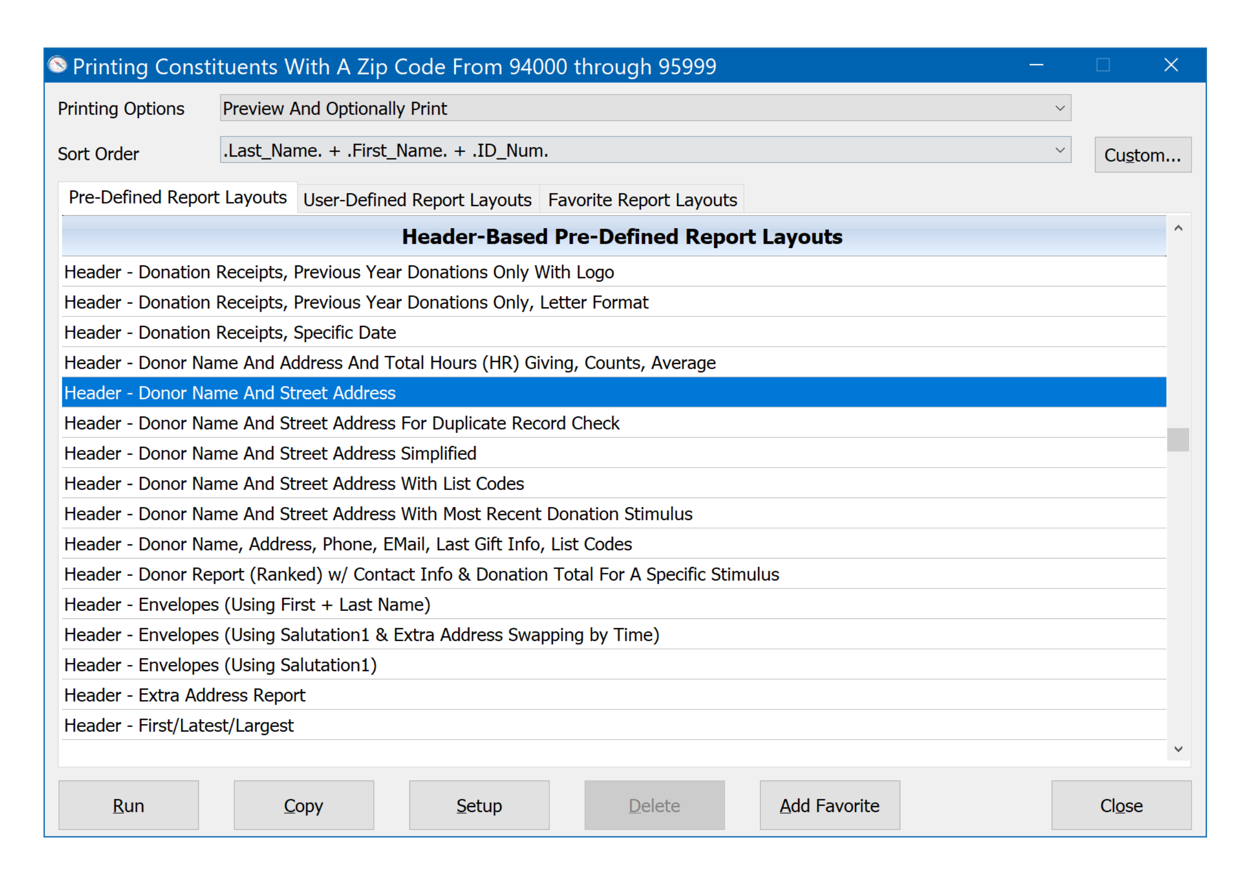


Finally click the Begin button of the Creating A Selection dialog to run the selection. You will then see a results window which will look like this:

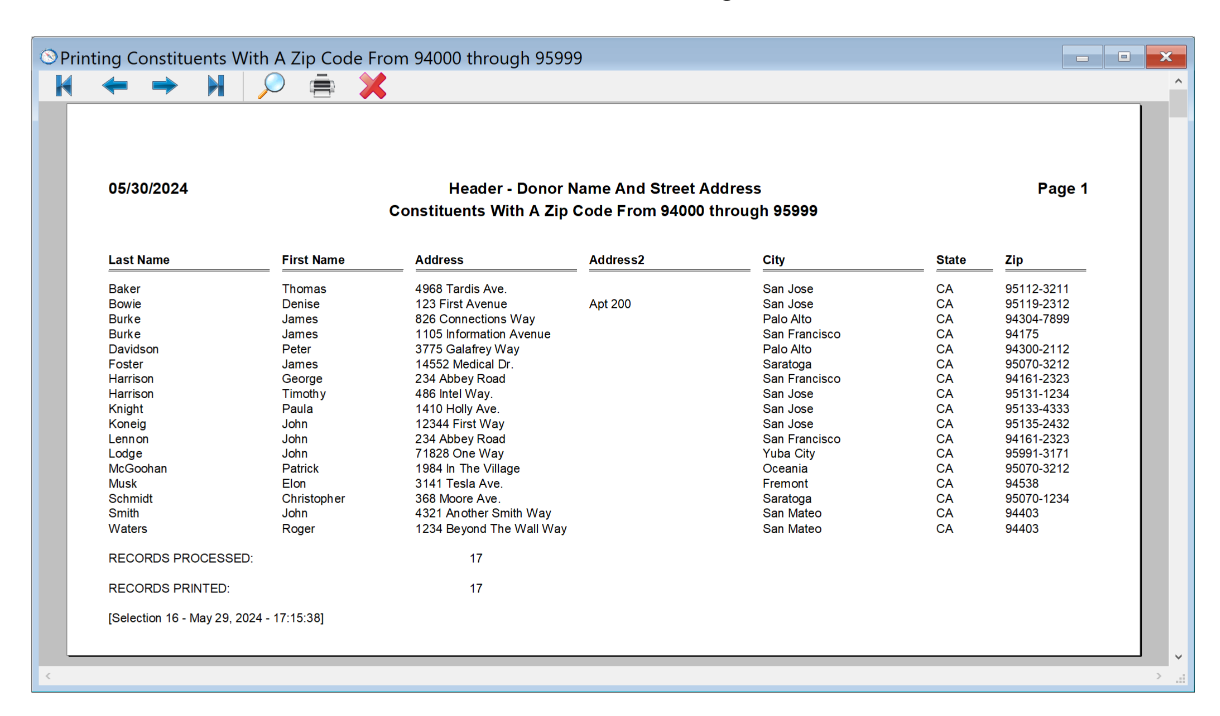


Notice that the selection we created is shown first, and has the name we gave it, "Zip Codes 94000 through 95999." Every selection should be given a meaningful name that will make sense to other DonorQuest users so they may reuse selections created by you. At this point there are many things we could do with the selection, but let's do one of the most common things you would do - print the selection via a report layout. One of the really nice features of DonorQuest is that you can take a single selection, and print it with many different reports. In DonorQuest, a report is just a page layout -- a collection of data fields like Last Name, First Name, Address, etc. The selection controls which donor records will print, and the report layout controls what information you see about the qualified donors who do print (i.e., which data columns are shown for them via the report).

Click on the Print Report button of the Selection Results window. You will see the DonorQuest report menu appear. Highlight the report named, "Header - Donor Name And Street Address." Be sure the Printing Options are set to Preview And Optionally Print. It should all look like this:



Next click the Run button. You should see the following:



05/30/2024 Header - Donor Name And Street Address Page 1
Constituents With A Zip Code From 94000 through 95999

Last Name	First Name	Address	Address2	City	State	Zip
Baker	Thomas	4968 Tardis Ave.		San Jose	CA	95112-3211
Bowie	Denise	123 First Avenue	Apt 200	San Jose	CA	95119-2312
Burke	James	826 Connections Way		Palo Alto	CA	94304-7899
Burke	James	1105 Information Avenue		San Francisco	CA	94175
Davidson	Peter	3775 Galafrey Way		Palo Alto	CA	94300-2112
Foster	James	14552 Medical Dr.		Saratoga	CA	95070-3212
Harrison	George	234 Abbey Road		San Francisco	CA	94161-2323
Harrison	Timothy	486 Intel Way.		San Jose	CA	95131-1234
Knight	Paula	1410 Holly Ave.		San Jose	CA	95133-4333
Koneig	John	12344 First Way		San Jose	CA	95135-2432
Lennon	John	234 Abbey Road		San Francisco	CA	94161-2323
Lodge	John	71828 One Way		Yuba City	CA	95991-3171
McGoohan	Patrick	1984 In The Village		Oceania	CA	95070-3212
Musk	Elon	3141 Tesla Ave.		Fremont	CA	94538
Schmidt	Christopher	368 Moore Ave.		Saratoga	CA	95070-1234
Smith	John	4321 Another Smith Way		San Mateo	CA	94403
Waters	Roger	1234 Beyond The Wall Way		San Mateo	CA	94403

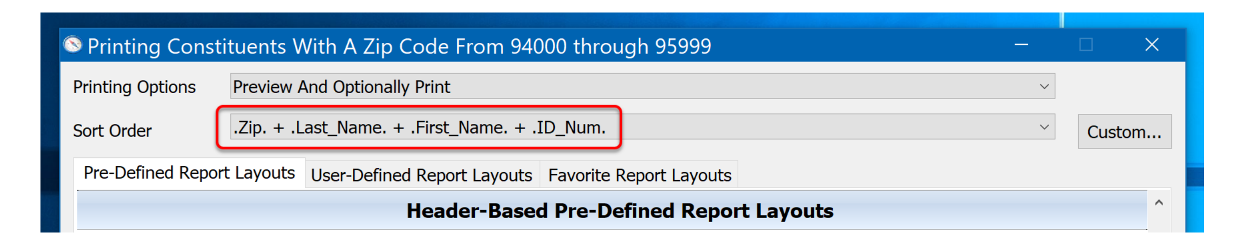
RECORDS PROCESSED: 17

RECORDS PRINTED: 17

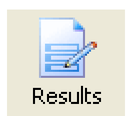
[Selection 16 - May 29, 2024 - 17:15:38]

Notice how the name we gave the selection is in the report heading. That's another reason why it's very important to give selections meaningful names, even if you plan to delete them after you are through with them. Notice also how the report is alphabetically ordered

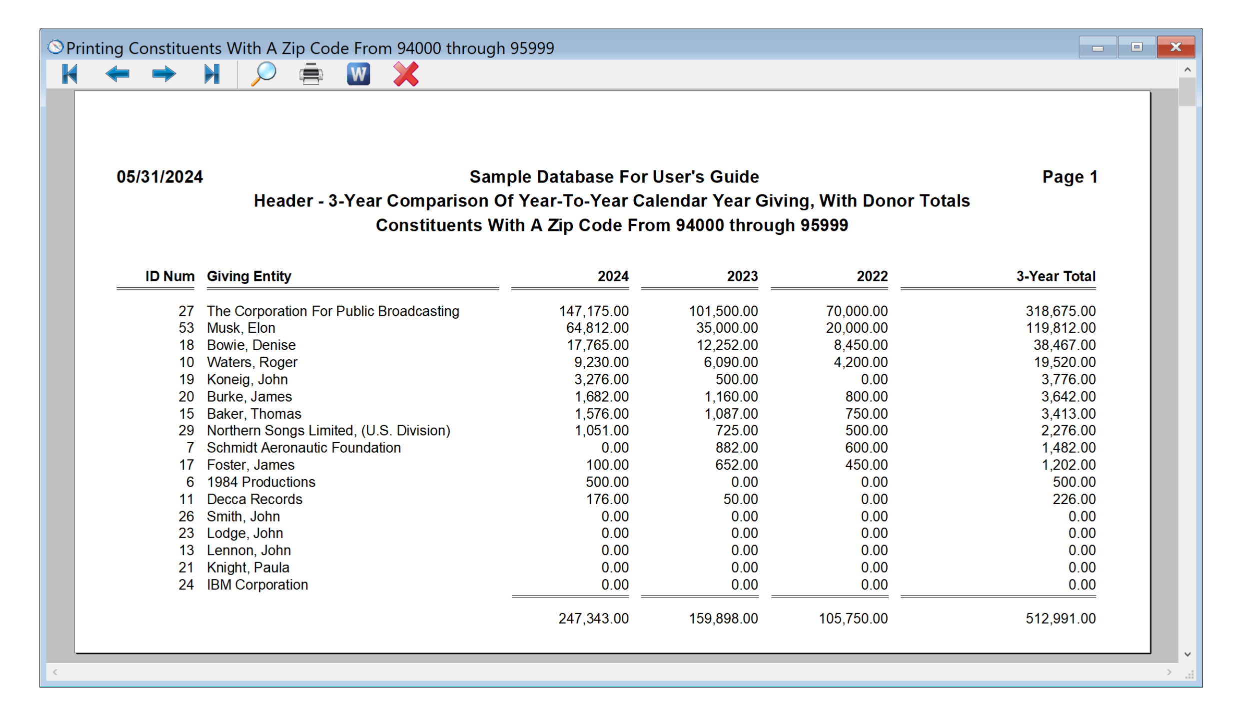
by Last and First name. If we had wanted the report in a different order -- such as zip code, then back on the report dialog we could have chosen a different Sort Order, like this:



Now cancel the report preview. Here comes some of the flexibility we mentioned. Let's say we want to see different information about the same list of people, such as what there giving has been for the past three years. Click on the Results button on the DonorQuest tool bar which looks like this:



This will bring back the list of all selection results created by you and other DonorQuest users. You should see that the selection you create, "Zip Codes 94000 through 95999" is still shown first. With that selection highlighted, click Print Report again. This time highlight the report titled, "Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals." Be sure the Printing Options are set to Preview And Optionally Print, and click Run. You should now see:



Printing Constituents With A Zip Code From 94000 through 95999

05/31/2024 Sample Database For User's Guide Page 1

Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals

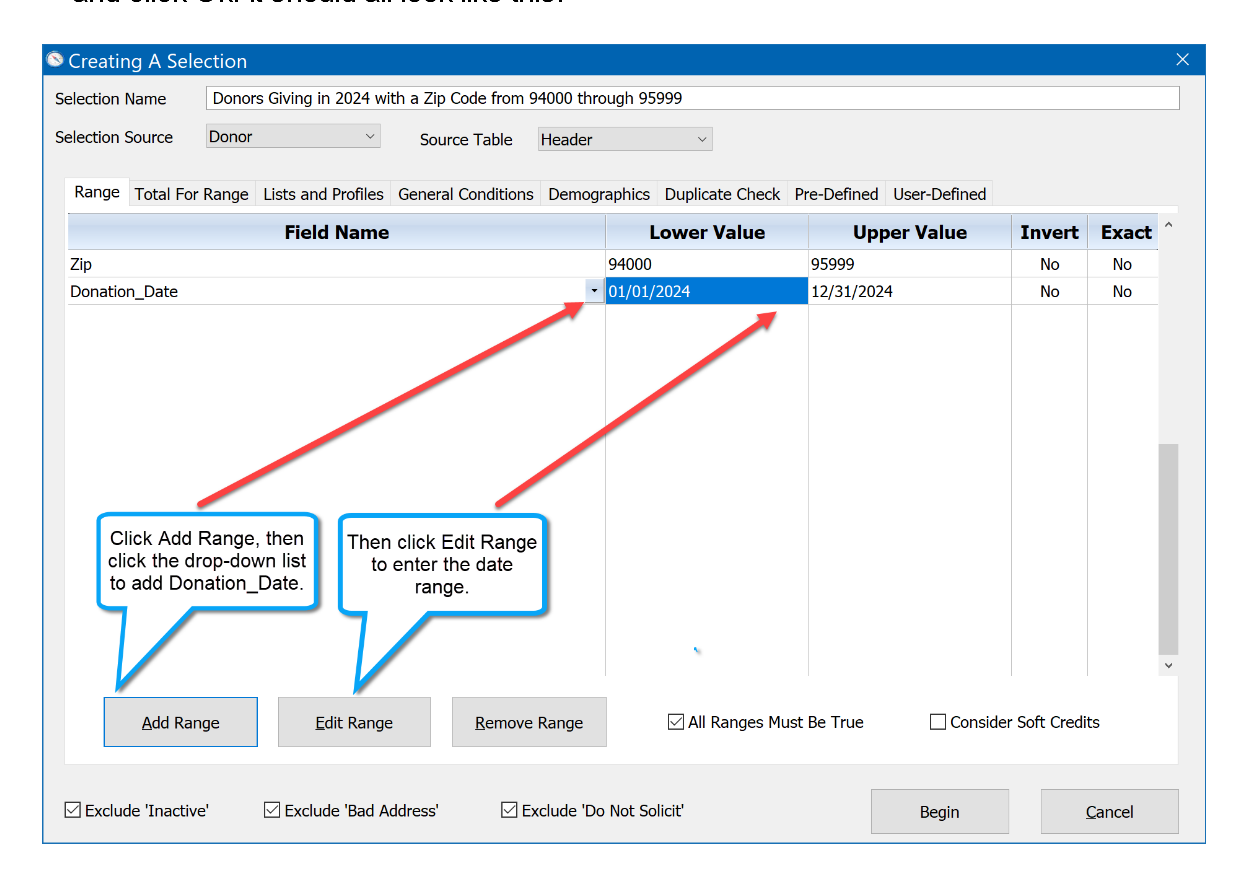
Constituents With A Zip Code From 94000 through 95999

ID Num	Giving Entity	2024	2023	2022	3-Year Total
27	The Corporation For Public Broadcasting	147,175.00	101,500.00	70,000.00	318,675.00
53	Musk, Elon	64,812.00	35,000.00	20,000.00	119,812.00
18	Bowie, Denise	17,765.00	12,252.00	8,450.00	38,467.00
10	Waters, Roger	9,230.00	6,090.00	4,200.00	19,520.00
19	Koneig, John	3,276.00	500.00	0.00	3,776.00
20	Burke, James	1,682.00	1,160.00	800.00	3,642.00
15	Baker, Thomas	1,576.00	1,087.00	750.00	3,413.00
29	Northern Songs Limited, (U.S. Division)	1,051.00	725.00	500.00	2,276.00
7	Schmidt Aeronautic Foundation	0.00	882.00	600.00	1,482.00
17	Foster, James	100.00	652.00	450.00	1,202.00
6	1984 Productions	500.00	0.00	0.00	500.00
11	Decca Records	176.00	50.00	0.00	226.00
26	Smith, John	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
		247,343.00	159,898.00	105,750.00	512,991.00

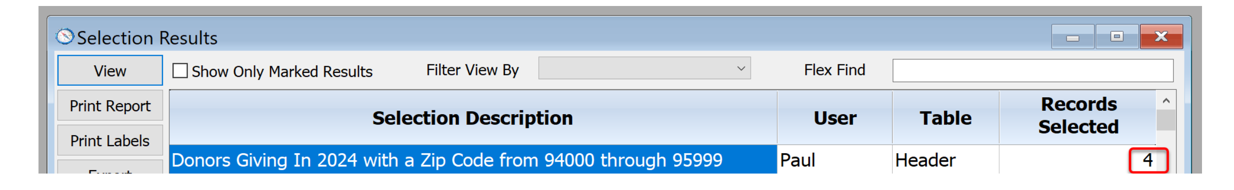
This is the same group of 16 donors who qualified for the zip code selection we ran, but you are now seeing different information about them. Now let's go a step further. Lets say you are only interested in seeing donors from that zip code range who have one or more

gifts in 2017. We could create an entirely new selection which has this additional filter condition, or we could add this condition to our existing result. Let's add the extra condition to our existing result. Proceed as follows:

1. Close any report preview you have open.
2. Click on the Results icon.
3. With our existing result, "Zip Codes 94000 through 95999" highlighted, click on the ReSelect button on the left.
4. You should now see the conditions of our original selection. Change the name to be, "Donors Giving In 2017 with a Zip Code from 94000 through 95999"
5. Next, click on the Add Range button.
6. Click on the drop-down arrow on the new field row and select Donation_Date.
7. Click the Edit Range button and enter a date range of 01/01/2017 through 12/31/2017 and click Ok. It should all look like this:

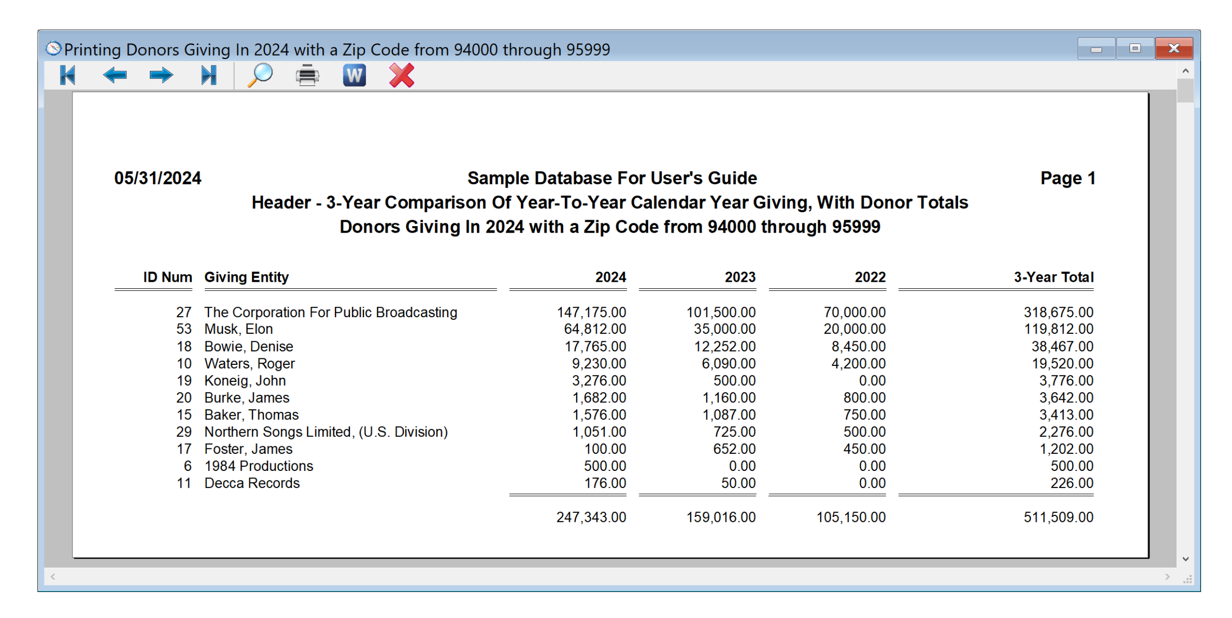


With the new donation date range condition added, click Begin. You should now see that with the added condition, the selection result dropped down to 4 records:



Now let's click the Print Report button and see our four donors who meet our two

conditions of living in zip code range 94000 to 95999, and who have some giving in 2017. Using the same report layout, "Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals" we now see:


Printing Donors Giving In 2024 with a Zip Code from 94000 through 95999

05/31/2024 Sample Database For User's Guide Page 1
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals
Donors Giving In 2024 with a Zip Code from 94000 through 95999

ID Num	Giving Entity	2024	2023	2022	3-Year Total
27	The Corporation For Public Broadcasting	147,175.00	101,500.00	70,000.00	318,675.00
53	Musk, Elon	64,812.00	35,000.00	20,000.00	119,812.00
18	Bowie, Denise	17,765.00	12,252.00	8,450.00	38,467.00
10	Waters, Roger	9,230.00	6,090.00	4,200.00	19,520.00
19	Koneig, John	3,276.00	500.00	0.00	3,776.00
20	Burke, James	1,682.00	1,160.00	800.00	3,642.00
15	Baker, Thomas	1,576.00	1,087.00	750.00	3,413.00
29	Northern Songs Limited, (U.S. Division)	1,051.00	725.00	500.00	2,276.00
17	Foster, James	100.00	652.00	450.00	1,202.00
6	1984 Productions	500.00	0.00	0.00	500.00
11	Decca Records	176.00	50.00	0.00	226.00
		247,343.00	159,016.00	105,150.00	511,509.00

If we had wanted to keep the original selection as it was, but use it as a starting point for an entirely new selection, we could have clicked on the ReSelect New button.

The main topic on Selections covers all the different options available in creating a selection.

5.13 Reports Button

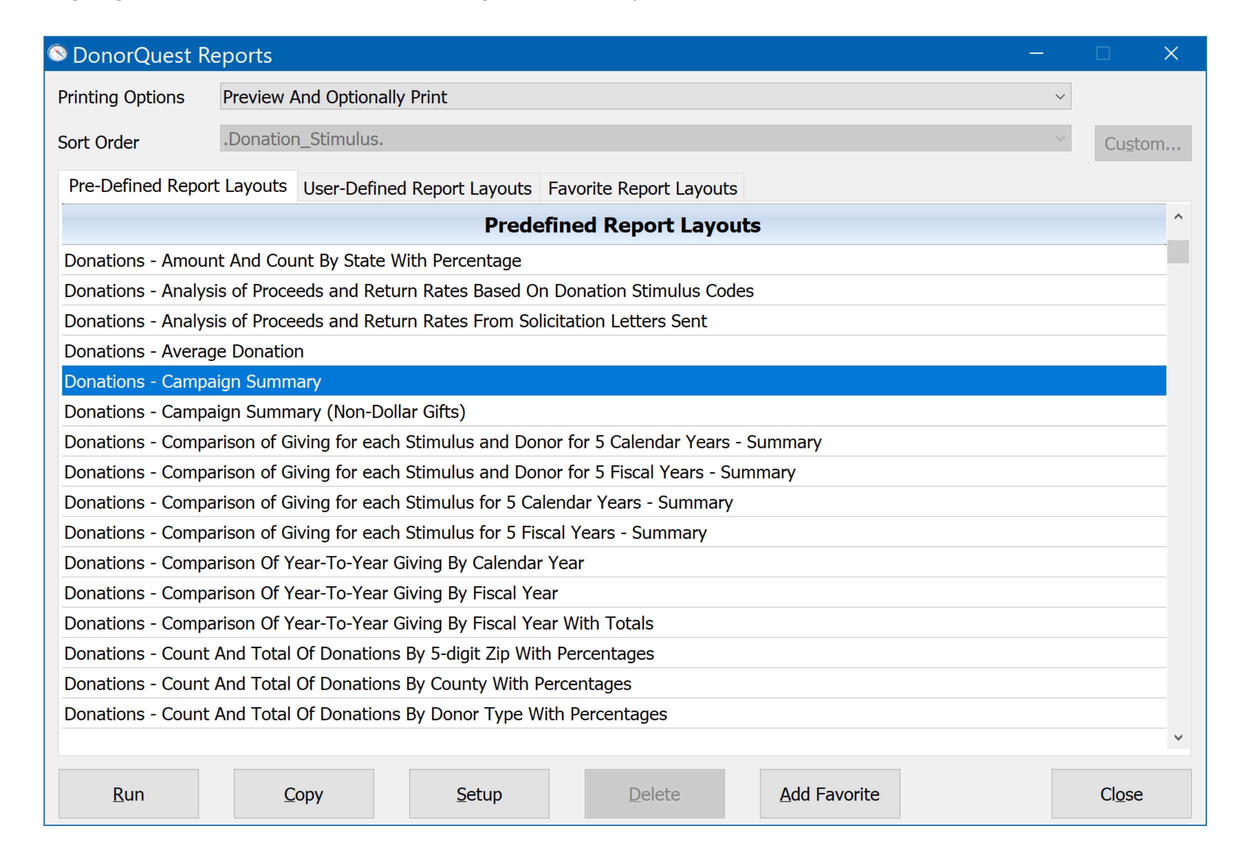


The Print/Setup Reports button is displayed as a printer button on the toolbar. Clicking on this button when there are no other windows open in DonorQuest will allow you to print a report using your entire database as opposed to just selected donors within it. The previous topic on Creating Selections gave an example of first narrowing down the records you would like to print by creating a Selection, then connecting that selection to a report layout. If you click on the Print button without having the Selections window open, then the report layout you choose will decide which records to print. In many cases there would be no filtering, so all records would print. Some reports, such as the, "Header - Top 100 Donor Report", do there own filtering or internal Selection.

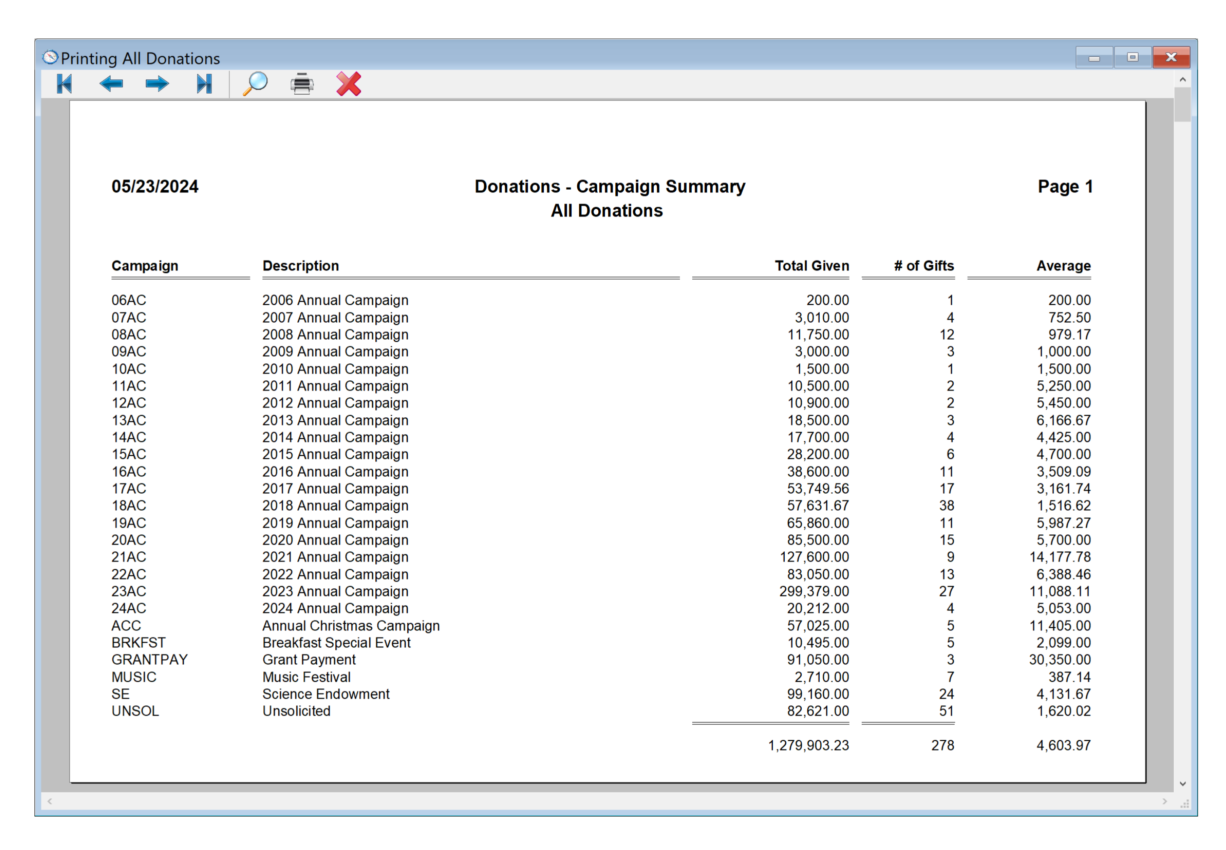
Let's take a look at a popular report titled, "Donations - Campaign Summary." Since this is a summary report, each line in the report represents many actual records added together. This is one of the reports which you would normally print without first doing a selection, since you would normally want it to represent all records in your database. But you could

indeed use it with a selection of specific donation records if you wish (to limit by donation date range for example), just as you can with absolutely every report layout in DonorQuest.

To preview this report, first start with all windows in DonorQuest closed. Then click on the Print button on the toolbar. You will see a menu of all the report layouts in DonorQuest. Highlight the "Donations - Campaign Summary" report like this:

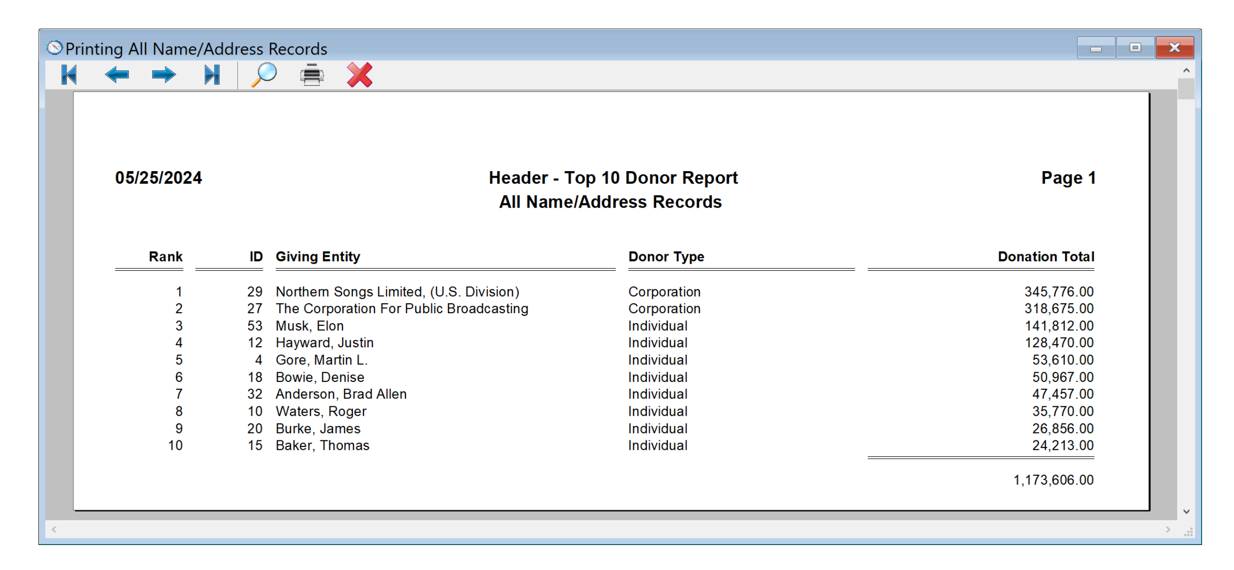


Be sure "Printing Options" is set to "Preview And Optionally Print", then click the Run button. With the sample database you should see:



Campaign	Description	Total Given	# of Gifts	Average
06AC	2006 Annual Campaign	200.00	1	200.00
07AC	2007 Annual Campaign	3,010.00	4	752.50
08AC	2008 Annual Campaign	11,750.00	12	979.17
09AC	2009 Annual Campaign	3,000.00	3	1,000.00
10AC	2010 Annual Campaign	1,500.00	1	1,500.00
11AC	2011 Annual Campaign	10,500.00	2	5,250.00
12AC	2012 Annual Campaign	10,900.00	2	5,450.00
13AC	2013 Annual Campaign	18,500.00	3	6,166.67
14AC	2014 Annual Campaign	17,700.00	4	4,425.00
15AC	2015 Annual Campaign	28,200.00	6	4,700.00
16AC	2016 Annual Campaign	38,600.00	11	3,509.09
17AC	2017 Annual Campaign	53,749.56	17	3,161.74
18AC	2018 Annual Campaign	57,631.67	38	1,516.62
19AC	2019 Annual Campaign	65,860.00	11	5,987.27
20AC	2020 Annual Campaign	85,500.00	15	5,700.00
21AC	2021 Annual Campaign	127,600.00	9	14,177.78
22AC	2022 Annual Campaign	83,050.00	13	6,388.46
23AC	2023 Annual Campaign	299,379.00	27	11,088.11
24AC	2024 Annual Campaign	20,212.00	4	5,053.00
ACC	Annual Christmas Campaign	57,025.00	5	11,405.00
BRKFST	Breakfast Special Event	10,495.00	5	2,099.00
GRANTPAY	Grant Payment	91,050.00	3	30,350.00
MUSIC	Music Festival	2,710.00	7	387.14
SE	Science Endowment	99,160.00	24	4,131.67
UNSOL	Unsolicited	82,621.00	51	1,620.02
		1,279,903.23	278	4,603.97

Now let's try a report which does some filtering. Close the preview, then click on the Print icon again on the DonorQuest toolbar to bring back the report menu. This time choose a report titled, "Header - Top 10 Donor Report." You'll have to scroll down a ways for it. Click the Run button once you have it highlighted. You should see:



Rank	ID	Giving Entity	Donor Type	Donation Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	345,776.00
2	27	The Corporation For Public Broadcasting	Corporation	318,675.00
3	53	Musk, Elon	Individual	141,812.00
4	12	Hayward, Justin	Individual	128,470.00
5	4	Gore, Martin L.	Individual	53,610.00
6	18	Bowie, Denise	Individual	50,967.00
7	32	Anderson, Brad Allen	Individual	47,457.00
8	10	Waters, Roger	Individual	35,770.00
9	20	Burke, James	Individual	26,856.00
10	15	Baker, Thomas	Individual	24,213.00
				1,173,606.00

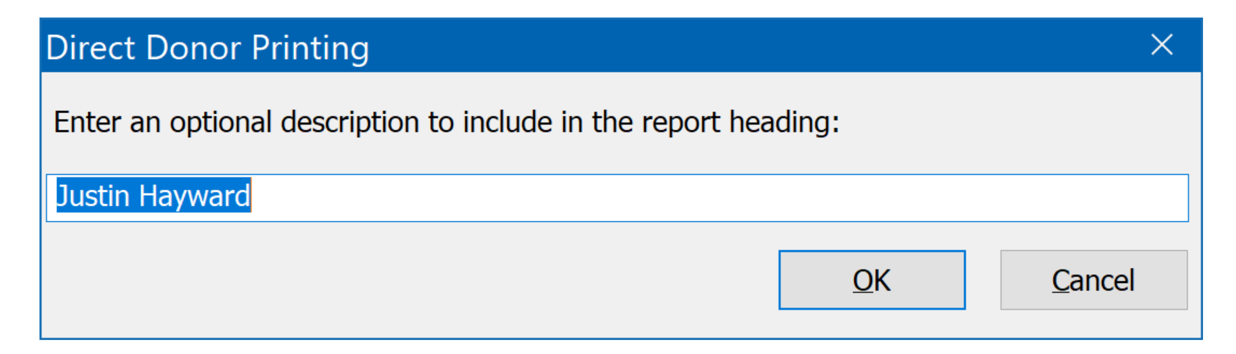
Now this report obviously did some of its own filtering or "selecting" of records because it automatically limited itself to printing only the top ten donors in the database. But you could also have run a selection for donors living in a certain zip code range and printed this same report with that result, effectively asking it to show you the top ten givers just in that zip code range (or any other condition you can think of). One report, many uses. This

ability of report layouts in DonorQuest to either "do their own thing" or to instead print just the records you want via a selection is a hallmark feature of DonorQuest. It allows a few hundred fairly generic stock report layouts to do the work that would require thousands of custom reports in some of the other donor management systems. And it doesn't stop there -- you can copy and customize any of the stock report layouts, adding and deleting columns to create a layout with just the data fields you want -- including any custom fields you may have created under the Configure, Setup User-Defined Fields feature of DonorQuest.

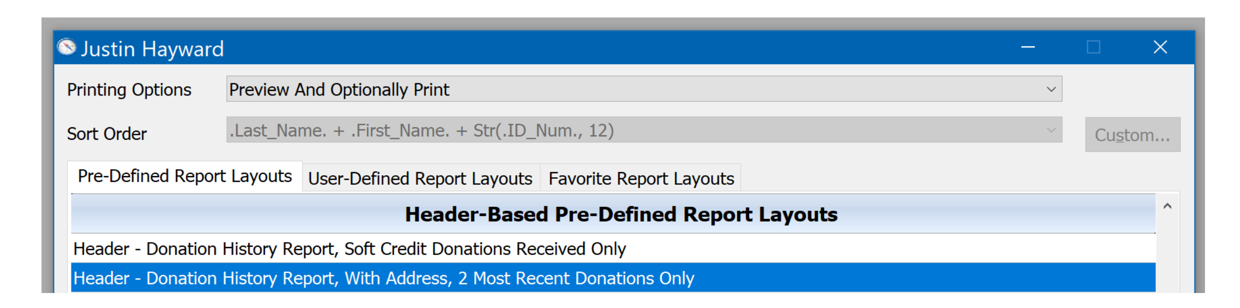
There is one more special thing the Print button on the DonorQuest toolbar will do -- it will allowed you to print one or more records from the Main Information window. For example, if you have the Main Information window open with the sample database, and positioned on the sample donor Justin Hayward like this:



Then clicking on the toolbar Print button will allow you to print Justin's record using any of the available report layouts. Give it a try. You will first be asked to enter an optional description to include in the report heading. This can be a miscellaneous note to yourself about why you are printing his record. The prompt looks like this:



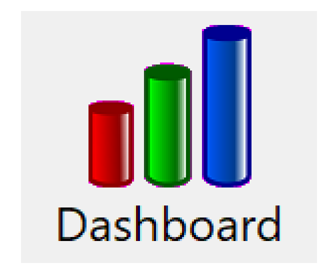
Click ok on that, then you will see the report menu. Let's print his record using the, "Header - Donation History Report, With Address, 2 Most Recent Donations Only" report, like this:



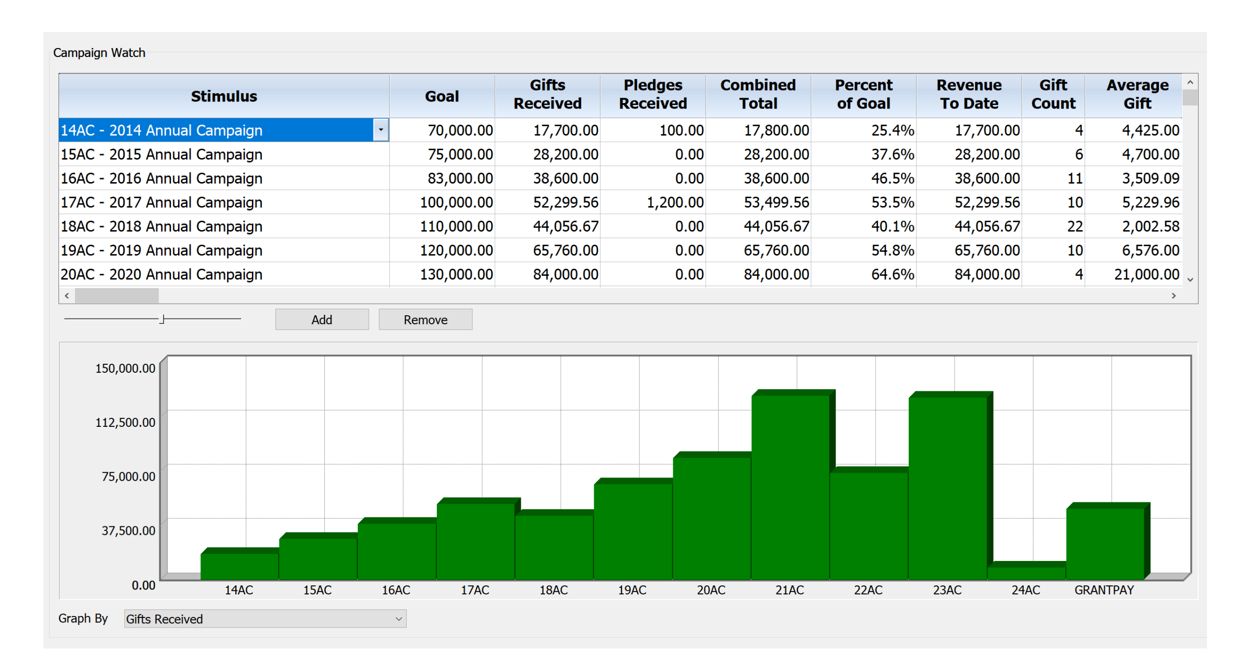
From here click the Run button to see the report preview. When you close the report preview, you will be taken back to Justin's record on the Main Information View. You could actually use the Mark button on the Main Information view to mark several records for printing in this way, essentially creating a hand-picked list of donors to have together on a single report layout of your choosing.

For more in-depth information about DonorQuest reports, please refer to the Report Writer topic.

5.14 Dashboard Button



The Dashboard button will open an interactive window showing you a live view of what's going on in your donor database from minute to minute. All of the displays within the dashboard are updated in realtime, so you may simply leave it open to continuously monitor the information which most interests you. The dashboard can be kept open along with other DonorQuest windows, allowing you to do your normal activities in DonorQuest while still monitoring events. If you have multiple monitors, you can even move it outside the main DonorQuest program window to other displays for convenient continuous viewing. It can also be resized to suit your preference and to fit nicely with whatever else you may have open. Any preference changes you make to the dashboard will be saved under your user account, allowing you to have your own customized dashboard. For example, part of the Dashboard allows you to monitor the following information about your ongoing campaigns:


Campaign Watch

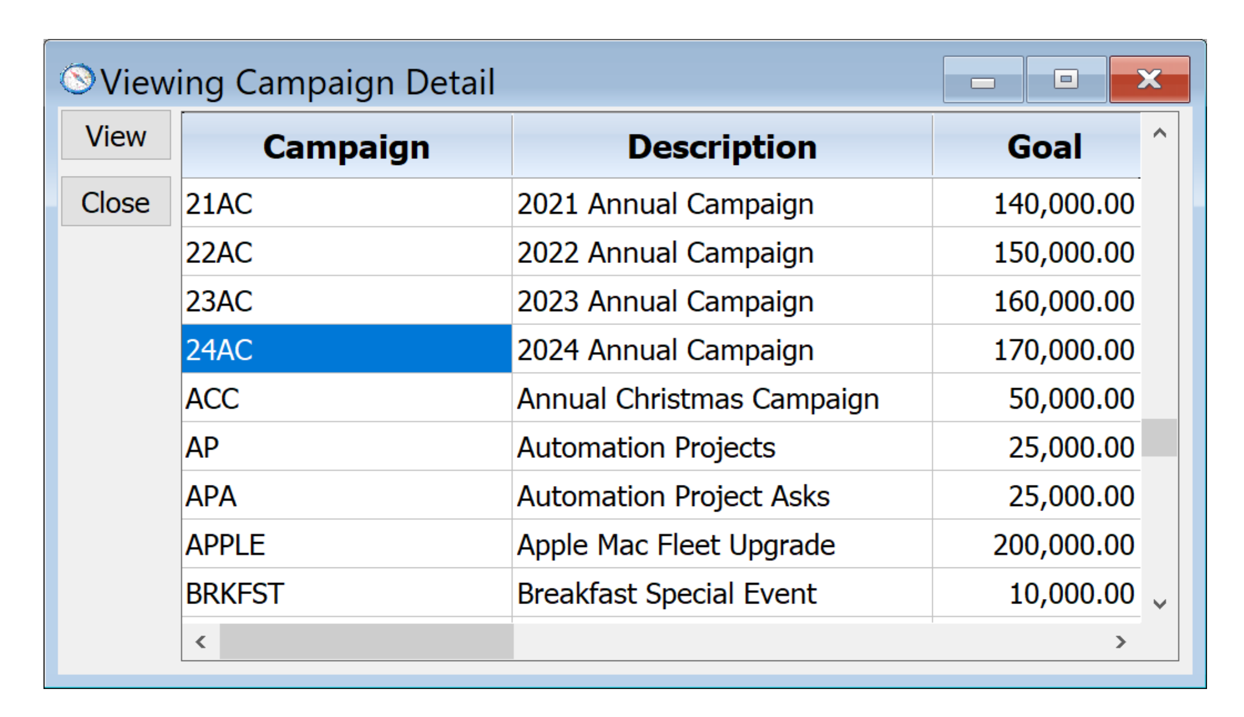
Stimulus	Goal	Gifts Received	Pledges Received	Combined Total	Percent of Goal	Revenue To Date	Gift Count	Average Gift
14AC - 2014 Annual Campaign	70,000.00	17,700.00	100.00	17,800.00	25.4%	17,700.00	4	4,425.00
15AC - 2015 Annual Campaign	75,000.00	28,200.00	0.00	28,200.00	37.6%	28,200.00	6	4,700.00
16AC - 2016 Annual Campaign	83,000.00	38,600.00	0.00	38,600.00	46.5%	38,600.00	11	3,509.09
17AC - 2017 Annual Campaign	100,000.00	52,299.56	1,200.00	53,499.56	53.5%	52,299.56	10	5,229.96
18AC - 2018 Annual Campaign	110,000.00	44,056.67	0.00	44,056.67	40.1%	44,056.67	22	2,002.58
19AC - 2019 Annual Campaign	120,000.00	65,760.00	0.00	65,760.00	54.8%	65,760.00	10	6,576.00
20AC - 2020 Annual Campaign	130,000.00	84,000.00	0.00	84,000.00	64.6%	84,000.00	4	21,000.00

For more information about the DonorQuest Dashboard, please refer to the Dashboard topic.

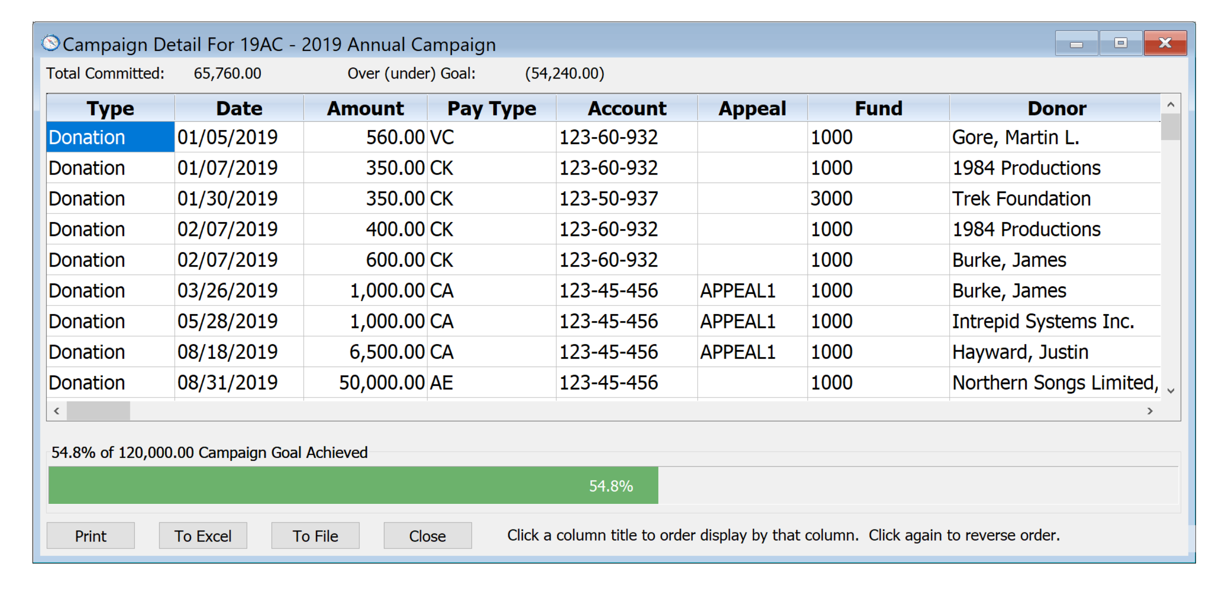
5.15 Campaign Statistics

Reports, Campaign Detail

Campaign Statistics can be viewed for donation and pledge totals, or for specific campaigns. When you setup a new campaign (under Configure, Edit/Print A Code Table, Donation/Pledge Stimulus, or by clicking on Reports, Campaign Detail), you can set a goal to strive for. Both pledges and donations are considered together toward meeting the goal you set. The Stimulus codes, which are shared by the donation and pledge tables, correspond to Campaign codes for this purpose (campaign codes are another name for Stimulus codes in DonorQuest). Once you have a campaign in progress with a goal set, you can monitor its progress at any time by clicking on Donor, Campaign Detail. From there you will be show a list of all campaign codes along with their descriptions and goals like this:



To see the stats for a specific campaign, simply double-click on it. For example, if you double-click on the 2017 Annual Campaign in the sample data, you will see:



You may have the Campaign Detail window open for multiple campaigns so you can compare their progress side-by-side. Pressing the F6 key on your keyboard will allow you to cycle through all of the Campaign Detail windows you have open. Of course the options of the DonorQuest Window menu are also available to help you organize your detail windows if you have quite a few open. Within each detail window you may order the display by any column. Click on the title of the column you would like to order by. Clicking once will order in ascending order, clicking again will change to descending order. For example, if you click on the Date column, it will order the donations and pledges from earliest to latest. That way you can quickly see the first donation given to the campaign, or

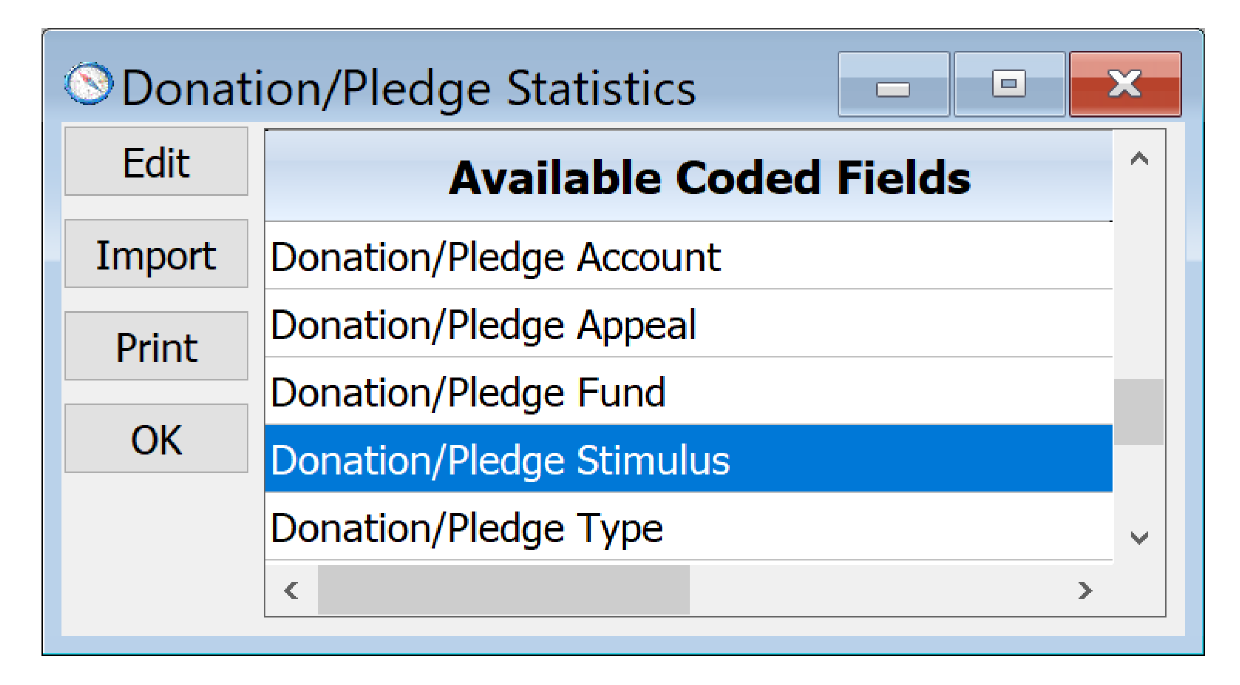
the most recent. Likewise you can order by Amount to see the smallest and largest gifts. Scrolling the display to the right (or widening the detail window) you will see the names and addresses of all the givers, along with their phone numbers. That way if you see a particularly large gift come in, you can give the giver a quick call to say thanks!

There are also buttons for printing the stats, sending them to Excel (or Calc for the online version of DonorQuest), or exporting them to a simple file on your computer for use with other software.

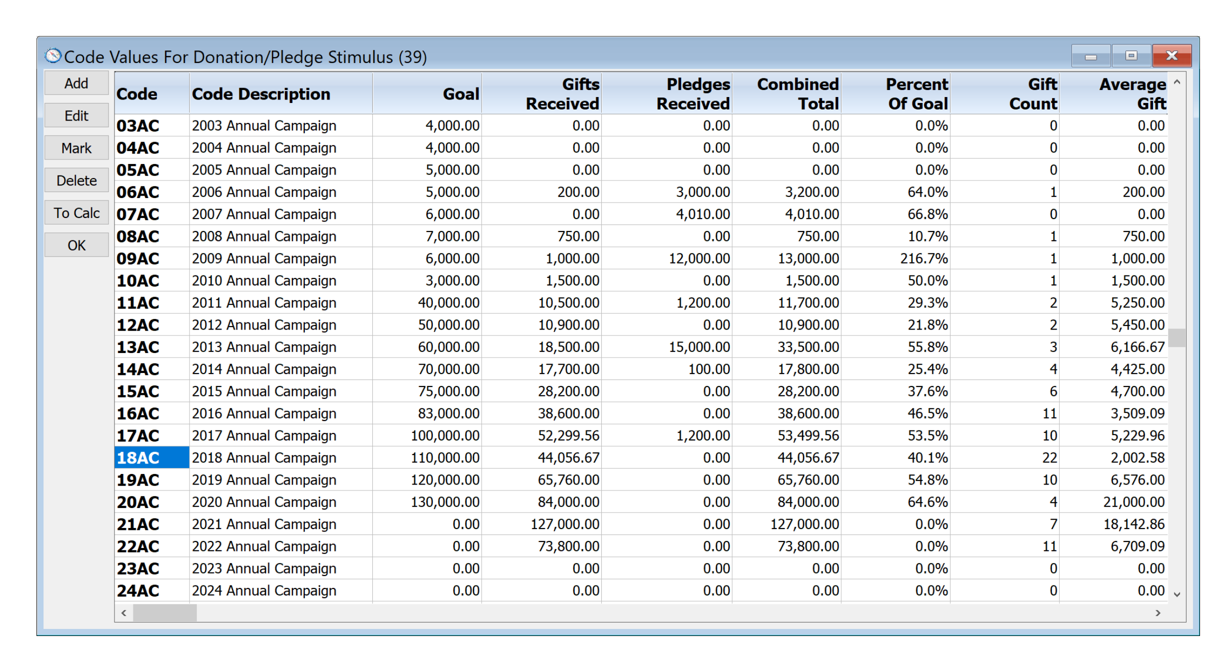
5.16 Donation/Pledge Statistics

Reports, Donation/Pledge Statistics

DonorQuest gathers statistics for Donations and Pledges. Specifically, it focuses on the Donation/Pledge Type, Account, Stimulus, Fund, and Appeal fields. To view or print these statistics, click on Reports, Donation/Pledge Statistics. You will see a small pop-up menu of the Donation and Pledge fields which statistics are gathered for:

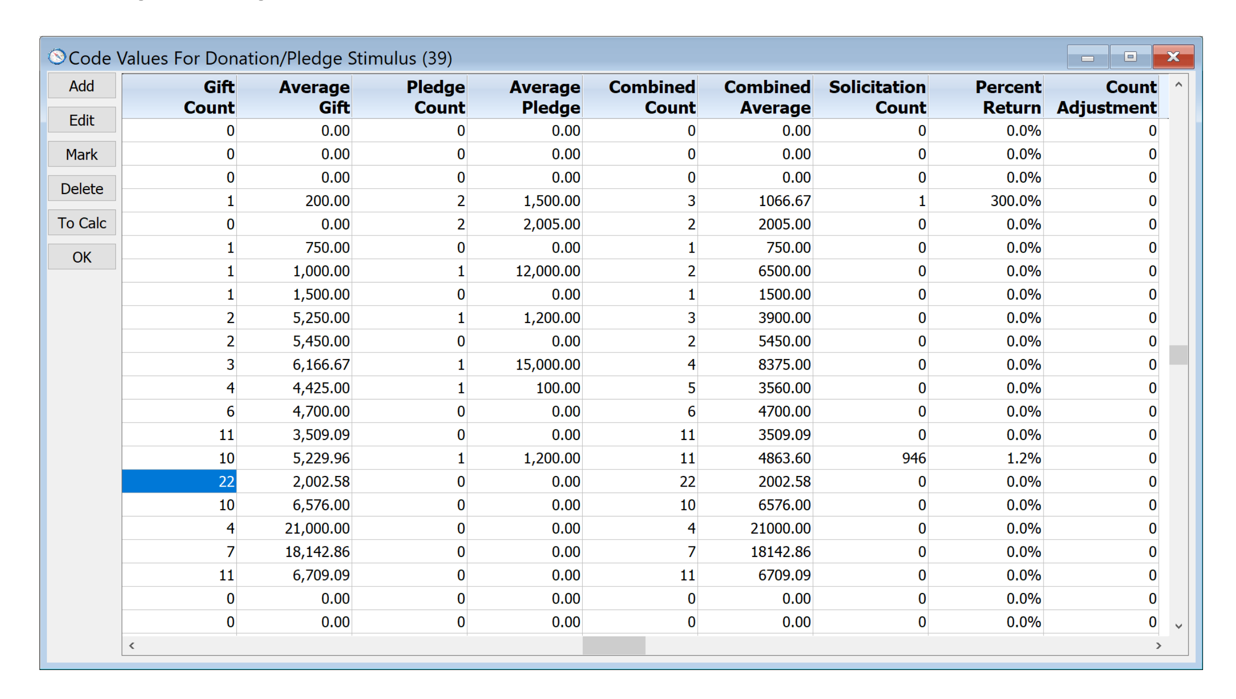


If you wish a printed statistic report, simply highlight the field you wish the report for and click the Print button. To open a data grid view of the statistics, double-click on the field you are interested (such as Donation/Pledge Stimulus). You will see a display similar to this:



Code	Code Description	Goal	Gifts Received	Pledges Received	Combined Total	Percent Of Goal	Gift Count	Average Gift
03AC	2003 Annual Campaign	4,000.00	0.00	0.00	0.00	0.0%	0	0.00
04AC	2004 Annual Campaign	4,000.00	0.00	0.00	0.00	0.0%	0	0.00
05AC	2005 Annual Campaign	5,000.00	0.00	0.00	0.00	0.0%	0	0.00
06AC	2006 Annual Campaign	5,000.00	200.00	3,000.00	3,200.00	64.0%	1	200.00
07AC	2007 Annual Campaign	6,000.00	0.00	4,010.00	4,010.00	66.8%	0	0.00
08AC	2008 Annual Campaign	7,000.00	750.00	0.00	750.00	10.7%	1	750.00
09AC	2009 Annual Campaign	6,000.00	1,000.00	12,000.00	13,000.00	216.7%	1	1,000.00
10AC	2010 Annual Campaign	3,000.00	1,500.00	0.00	1,500.00	50.0%	1	1,500.00
11AC	2011 Annual Campaign	40,000.00	10,500.00	1,200.00	11,700.00	29.3%	2	5,250.00
12AC	2012 Annual Campaign	50,000.00	10,900.00	0.00	10,900.00	21.8%	2	5,450.00
13AC	2013 Annual Campaign	60,000.00	18,500.00	15,000.00	33,500.00	55.8%	3	6,166.67
14AC	2014 Annual Campaign	70,000.00	17,700.00	100.00	17,800.00	25.4%	4	4,425.00
15AC	2015 Annual Campaign	75,000.00	28,200.00	0.00	28,200.00	37.6%	6	4,700.00
16AC	2016 Annual Campaign	83,000.00	38,600.00	0.00	38,600.00	46.5%	11	3,509.09
17AC	2017 Annual Campaign	100,000.00	52,299.56	1,200.00	53,499.56	53.5%	10	5,229.96
18AC	2018 Annual Campaign	110,000.00	44,056.67	0.00	44,056.67	40.1%	22	2,002.58
19AC	2019 Annual Campaign	120,000.00	65,760.00	0.00	65,760.00	54.8%	10	6,576.00
20AC	2020 Annual Campaign	130,000.00	84,000.00	0.00	84,000.00	64.6%	4	21,000.00
21AC	2021 Annual Campaign	0.00	127,000.00	0.00	127,000.00	0.0%	7	18,142.86
22AC	2022 Annual Campaign	0.00	73,800.00	0.00	73,800.00	0.0%	11	6,709.09
23AC	2023 Annual Campaign	0.00	0.00	0.00	0.00	0.0%	0	0.00
24AC	2024 Annual Campaign	0.00	0.00	0.00	0.00	0.0%	0	0.00

Scrolling to the right will reveal these additional columns:



Gift Count	Average Gift	Pledge Count	Average Pledge	Combined Count	Combined Average	Solicitation Count	Percent Return	Count Adjustment
0	0.00	0	0.00	0	0.00	0	0.0%	0
0	0.00	0	0.00	0	0.00	0	0.0%	0
0	0.00	0	0.00	0	0.00	0	0.0%	0
1	200.00	2	1,500.00	3	1066.67	1	300.0%	0
0	0.00	2	2,005.00	2	2005.00	0	0.0%	0
1	750.00	0	0.00	1	750.00	0	0.0%	0
1	1,000.00	1	12,000.00	2	6500.00	0	0.0%	0
1	1,500.00	0	0.00	1	1500.00	0	0.0%	0
2	5,250.00	1	1,200.00	3	3900.00	0	0.0%	0
2	5,450.00	0	0.00	2	5450.00	0	0.0%	0
3	6,166.67	1	15,000.00	4	8375.00	0	0.0%	0
4	4,425.00	1	100.00	5	3560.00	0	0.0%	0
6	4,700.00	0	0.00	6	4700.00	0	0.0%	0
11	3,509.09	0	0.00	11	3509.09	0	0.0%	0
10	5,229.96	1	1,200.00	11	4863.60	946	1.2%	0
22	2,002.58	0	0.00	22	2002.58	0	0.0%	0
10	6,576.00	0	0.00	10	6576.00	0	0.0%	0
4	21,000.00	0	0.00	4	21000.00	0	0.0%	0
7	18,142.86	0	0.00	7	18142.86	0	0.0%	0
11	6,709.09	0	0.00	11	6709.09	0	0.0%	0
0	0.00	0	0.00	0	0.00	0	0.0%	0
0	0.00	0	0.00	0	0.00	0	0.0%	0

At this level, you are able to change and delete existing codes, as well as add new codes, just as you are able to do in the general code field setup in DonorQuest. You may also copy the statistics data grid to a new Excel spreadsheet by pressing the To Excel button (or the ToCalc button in the online version of DonorQuest).

Following is a discussion of each of the columns in this statistical display:

Code

This column shows the user-defined code values for which statistics are being gathered. Depending on your selection on the Donation/Pledge Statistics menu, these will be Donation/Pledge Type, Account, Stimulus, Fund, or Appeal codes.

Code Description

The full description of each code. Codes themselves are typically one to fifteen characters in length. Code descriptions provide meaningful explanations of what each code represents.

Goal

Used only for Donation/Pledge Stimulus codes, the goal entered here is a revenue goal for each campaign (Stimulus) code. This value together with the Combined Total column is used to build the Campaign Statistics display, showing the percent of goal achieved for each campaign.

Gifts Received

A total of actual funds received for each code. This amount does not include donations which are designated as pledge payments, since pledge amounts are accounted for separately. If you wish to see total revenue for a campaign that's, "in the bank", run the standard DonorQuest report, "Donations - Campaign Summary." This report will aggregate outright gifts with pledge payments made so far for each campaign.

Pledges Received

A total of all pledge amounts promised (but not necessarily completely paid yet) for each campaign.

Combined Total

This column shows the sum of the Gifts Received and Pledges Received columns, and it accurately reflects the total amount committed to a each campaign (Stimulus), Appeal, Account, Fund, or Donation Type.

Percent Of Goal

Used only for Donation/Pledge Stimulus Codes, the Percent of Goal column is derived from the goal you set for each campaign (Stimulus), and the Combined Total revenue committed for each campaign (Stimulus).

Gift Count

A Count of the number of outright Donations received so far. This does not include donations which are pledge payments.

Average Gift

Derived from the Gifts Received and Gift Count columns.

Pledge Count

A Count of the number of pledges received so far.

Average Pledge

Derived from the Pledges Received and Pledge Count columns.

Combined Count

A total count of all outright gifts and pledged gifts.

Combined Average

The average amount of outright gifts and pledged gifts.

Solicitation Count

The total number of solicitations sent out for each campaign, and each appeal. Typically a campaign (Stimulus) may have many appeals, or just one. This count is only gathered for the Donation Stimulus and Donation Appeal codes.

Percent Return

The percent of donors who responded to your solicitation with a donation.

Count Adjustment

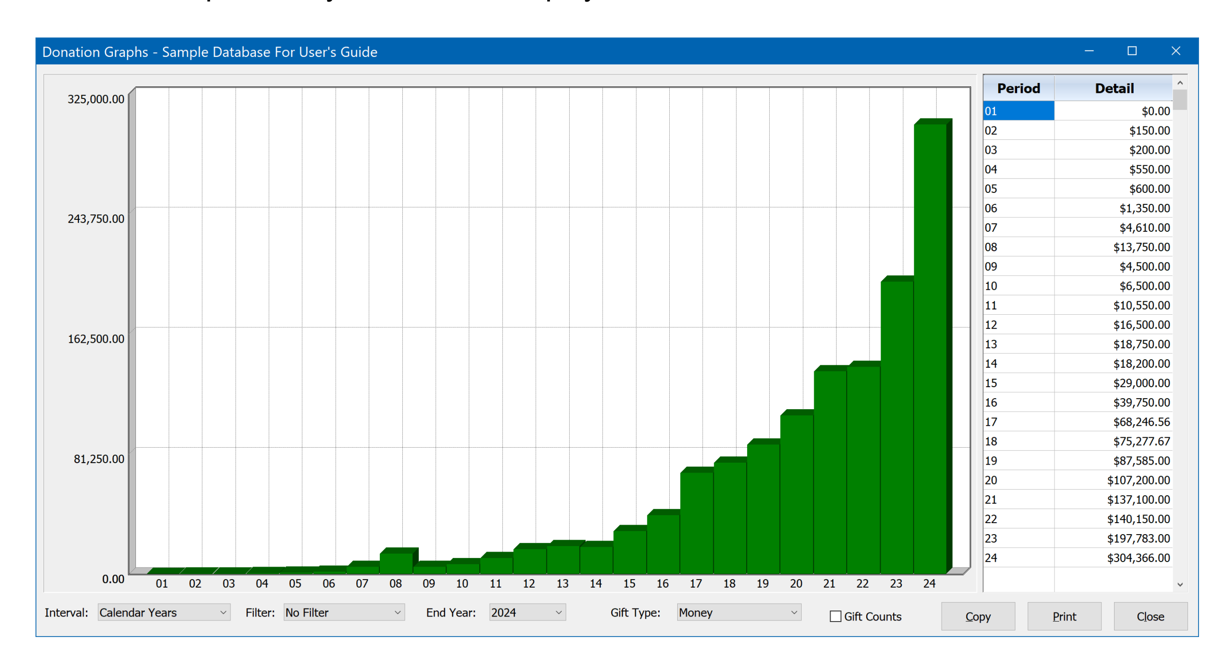
DonorQuest allows you to do in-house donor and prospect mailings using the names already in DonorQuest, and will even track the rate of return for you using the Solicitation Tracking feature. But often times direct mail solicitations for specific campaigns are done by an outside 3rd party mailing house, sometimes combined with mailings you do in-house using donor and prospect records you already have in DonorQuest. DonorQuest allows you to make a manual adjustment to the total count of mail pieces sent for each of your stimulus and appeal codes to reflect mailings done by 3rd party mailing houses. This allows the DonorQuest campaign analysis reports to accurately reflect the combined response rate for all of your in-house and 3rd party mailing house campaigns. For example, if you did an in-house mailing of 5,000 pieces of mail for your 2014 Annual campaign, and an outside mailing house did another 15,000 for the same campaign, you would enter 15,000 for the Solicitation Count Adjustment for the campaign code.

5.17 Donation Graphs

Reports, Graphs, Donation Graphs

Donation Graphs in DonorQuest are designed to give you the big picture of how your organization has been doing over time. The graphs look at total revenue and gifts counts for your organization over a time span, and uniform intervals of time within that span. You

can set both the overarching time span, and the intervals of time within the span, and the graph will interactively redraw itself. To view the standard graph, click on Reports, Graphs, Donation Graphs, and you will see a display similar to this:



When first opened, the graph will show the default display of a twenty-four year time span, with total revenue broken down by calendar years. You can change the interval to be fiscal years, months, or weeks. The ending date of the graph may also be set to any date you wish. For example, if you set the ending date to 12/31/2008, and keep the interval at calendar years, the graph would cover the years 1984-2008. Or if you set the ending date at 12/31/2015 and set the interval to be months, the graph would span two years, showing 24 monthly revenue totals. In addition to monetary totals, using the Gift Type control you may also choose from one of the two Alternate Unit donation types DonorQuest allows (such as hours of time for volunteers, or pounds of food, etc.) Finally, you also have the option of graphing gift counts instead of amount totals. This is done by checking the box labeled, "gift counts." You may toggle back and forth between the gift total and gift count graphs to see the relationship between the two. This can be very revealing. For example, you may find that in some years, while the total revenue was about the same, one year saw a much larger number of gifts going into making the total. That will tell you that for that year, your campaign efforts may have brought in more gifts, but not really anymore revenue. So you would then want to review the campaigns you ran in the lower gift count (but equal revenue) years. Since the revenue was the same, that will tell you that the campaigning for the lower gift count year was actually reaching more affluent donors, and perhaps you should refocus your efforts there again, since a gift count boost there would be far more valuable.

The donation graphs may also be driven by a donation-based selection result. This allows you to filter the donations included by any conceivable condition or set of conditions. To graph a donation-based selection result (one built from the donations table), open the Selection Results window, highlight the donation result you wish to graph, then click on Selections, Donation Graphs From. Alternatively you may also click on the Graph button on the left side of the Selection Results window.

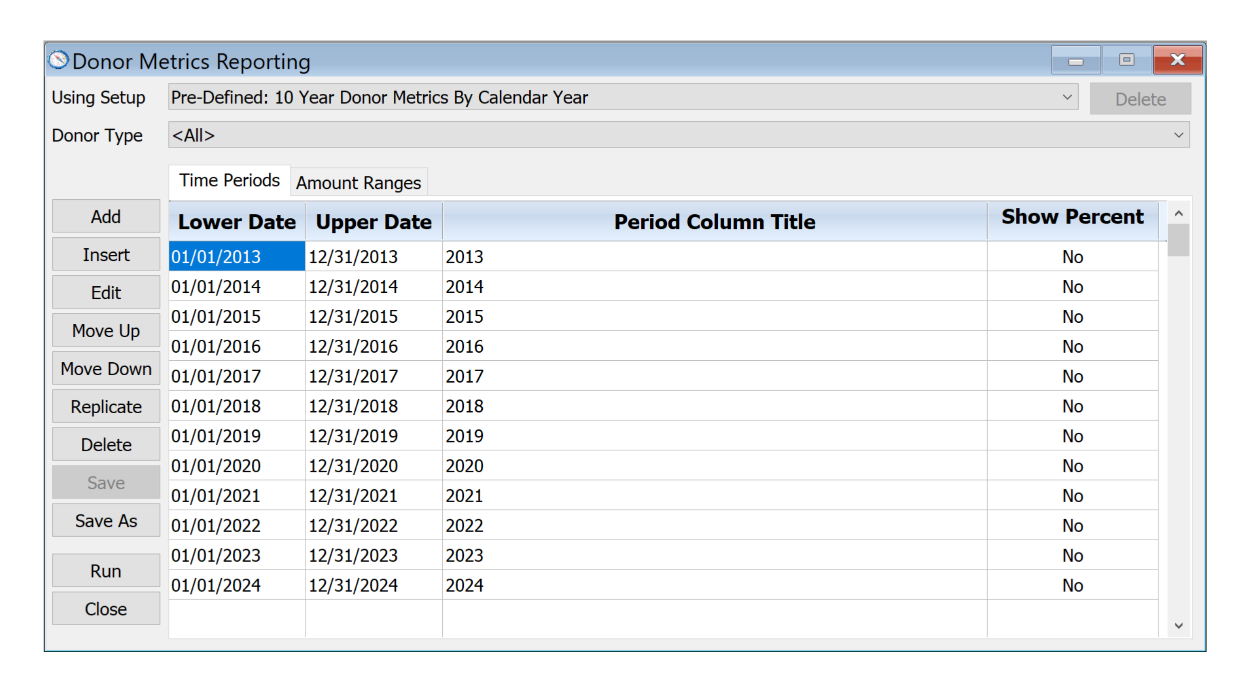
5.18 Donor Metrics

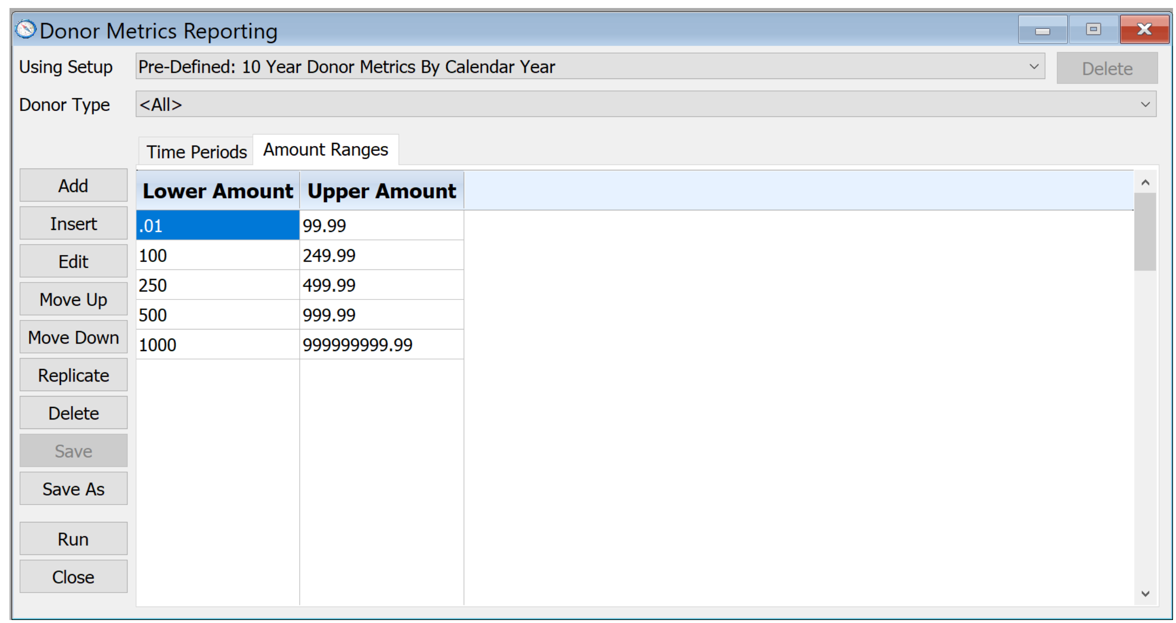
Reports, Donor Metrics

The Donor Metrics reporting capability of DonorQuest essentially allows you to compare statistical changes in donor giving behavior between multiple time periods. The metrics shown are Total Number of Donors, Number of New Donors, Number of Repeat Donors, Total Number of Donations, Dollar Total of Donations, Average Donation Amount, and Average Number of Gifts Per Donor. In addition to these metrics being shown in total for each period, the same metrics are also shown broken down by donation amount range. All aspects of the reporting are customizable, including the specific time periods compared, and the specific donation amount ranges shown. There are currently twelve predefined setups, all of which can be copied and customized. The predefined setups included with DonorQuest are:

10 Year Donor Metrics By Calendar Year
10 Year Donor Metrics By Calendar Year With Year-To-Year Percentage Change
10 Year Donor Metrics By Fiscal Year
10 Year Donor Metrics By Fiscal Year With Year-To-Year Percentage Change
Q1 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q2 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q3 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q4 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q1 Comparison Of Monthly Revenue, Current And Previous Fiscal Year
Q2 Comparison Of Monthly Revenue, Current And Previous Fiscal Year
Q3 Comparison Of Monthly Revenue, Current And Previous Fiscal Year
Q4 Comparison Of Monthly Revenue, Current And Previous Fiscal Year

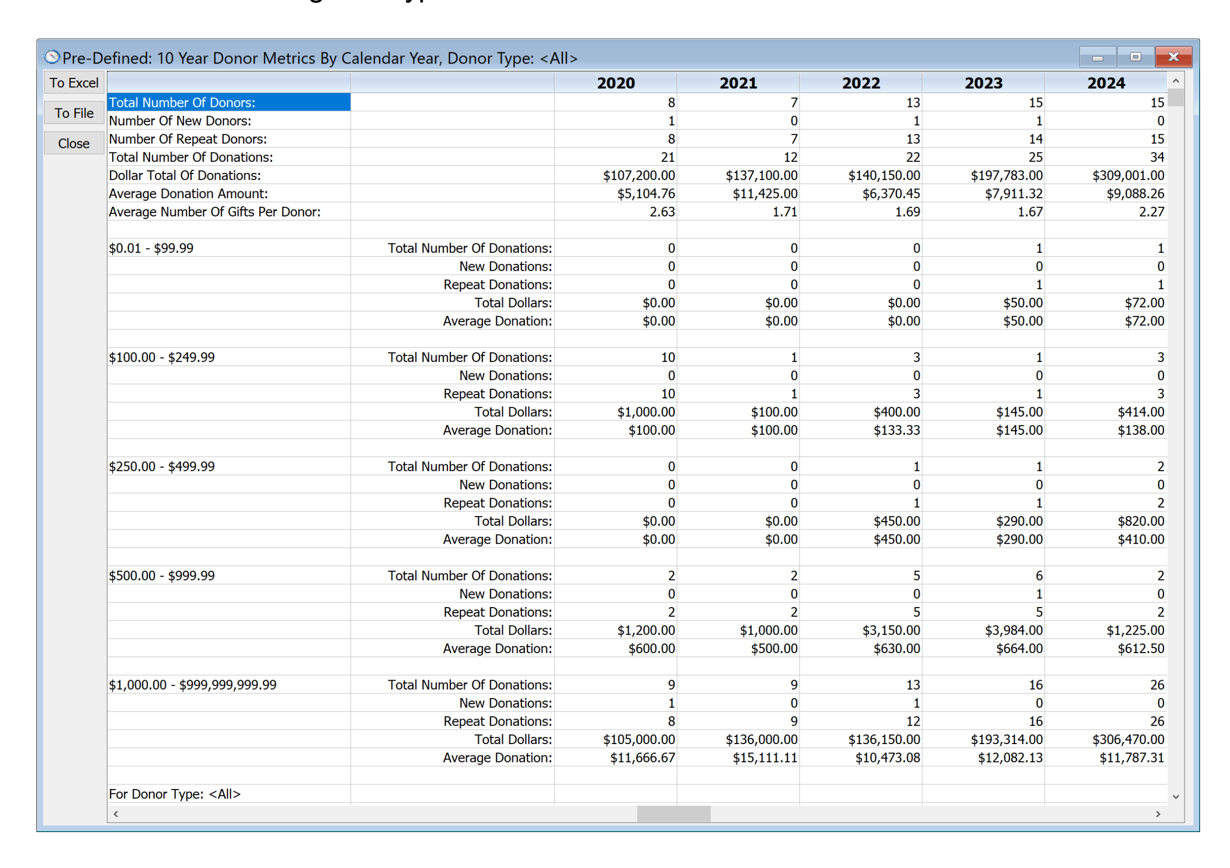
Here is what the Donor Metrics reporting interface looks like with the, "10 Year Donor Metrics By Calendar Year" setup open:





The Setup drop-down allows you to choose from among the predefined setups, and any setups which you create. For example, you could modify any of the date or amount ranges in one of the predefined setups, then click on the Save button to create a new custom setup which you can then edit. These date and amount ranges determine the actual columns and rows of the report. The donations included can be additionally filtered by a specific Donor Type chosen directly on the Donor Metrics main dialog, or you can even drive a Donor Metrics session with a donation-based Selection Result to filter donations based on absolutely any condition you can think of. To run Donor Metrics for a donation-based selection result (one built from the donations table), open the Selection Results window, highlight the donation result you wish to run Donor Metrics for, then click on Selections, Donor Metrics From.

Here is what running the Donor Metrics report with the, "10 Year Donor Metrics By Calendar Year" setting on a typical donor database looks like:



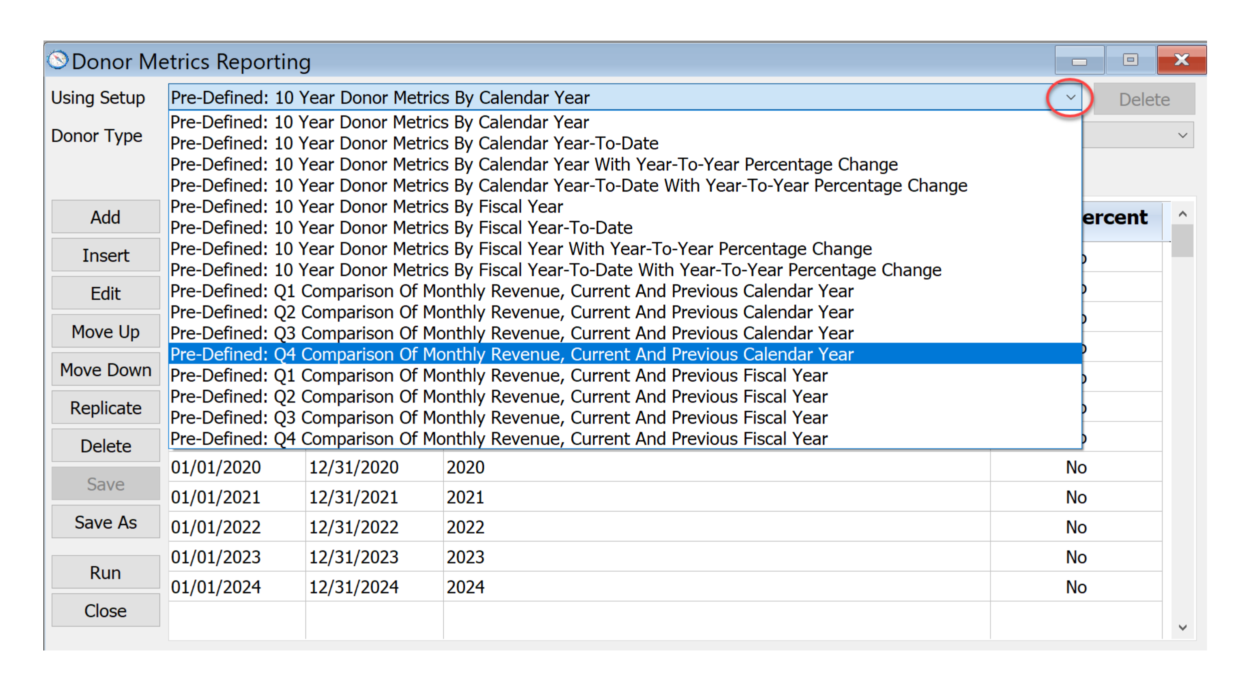
Pre-Defined: 10 Year Donor Metrics By Calendar Year, Donor Type: <All>

To Excel | To File | Close

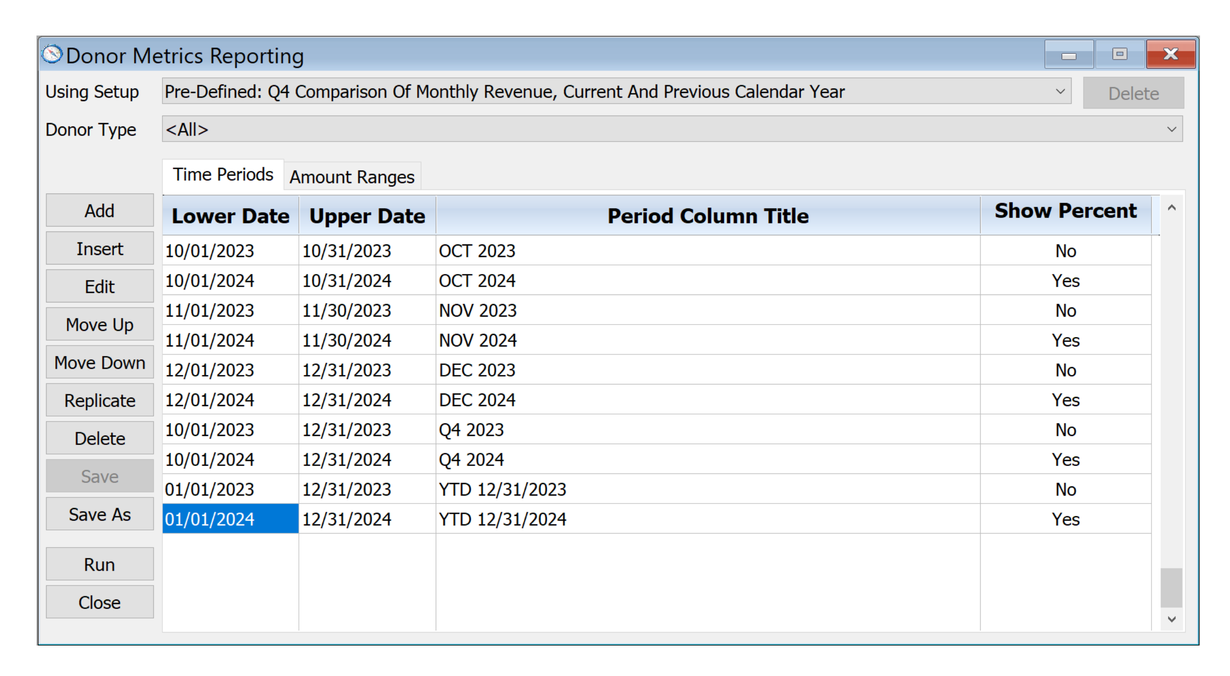
		2020	2021	2022	2023	2024
Total Number Of Donors:		8	7	13	15	15
Number Of New Donors:		1	0	1	1	0
Number Of Repeat Donors:		8	7	13	14	15
Total Number Of Donations:		21	12	22	25	34
Dollar Total Of Donations:		$107,200.00	$137,100.00	$140,150.00	$197,783.00	$309,001.00
Average Donation Amount:		$5,104.76	$11,425.00	$6,370.45	$7,911.32	$9,088.26
Average Number Of Gifts Per Donor:		2.63	1.71	1.69	1.67	2.27
$0.01 - $99.99	Total Number Of Donations:	0	0	0	1	1
	New Donations:	0	0	0	0	0
	Repeat Donations:	0	0	0	1	1
	Total Dollars:	$0.00	$0.00	$0.00	$50.00	$72.00
	Average Donation:	$0.00	$0.00	$0.00	$50.00	$72.00
$100.00 - $249.99	Total Number Of Donations:	10	1	3	1	3
	New Donations:	0	0	0	0	0
	Repeat Donations:	10	1	3	1	3
	Total Dollars:	$1,000.00	$100.00	$400.00	$145.00	$414.00
	Average Donation:	$100.00	$100.00	$133.33	$145.00	$138.00
$250.00 - $499.99	Total Number Of Donations:	0	0	1	1	2
	New Donations:	0	0	0	0	0
	Repeat Donations:	0	0	1	1	2
	Total Dollars:	$0.00	$0.00	$450.00	$290.00	$820.00
	Average Donation:	$0.00	$0.00	$450.00	$290.00	$410.00
$500.00 - $999.99	Total Number Of Donations:	2	2	5	6	2
	New Donations:	0	0	0	1	0
	Repeat Donations:	2	2	5	5	2
	Total Dollars:	$1,200.00	$1,000.00	$3,150.00	$3,984.00	$1,225.00
	Average Donation:	$600.00	$500.00	$630.00	$664.00	$612.50
$1,000.00 - $999,999,999.99	Total Number Of Donations:	9	9	13	16	26
	New Donations:	1	0	1	0	0
	Repeat Donations:	8	9	12	16	26
	Total Dollars:	$105,000.00	$136,000.00	$136,150.00	$193,314.00	$306,470.00
	Average Donation:	$11,666.67	$15,111.11	$10,473.08	$12,082.13	$11,787.31
For Donor Type: <All>						

The above image only shows the most recent five years with full data since (we scrolled the display to the right), but of course the full report shows all years 2006 through 2017. The predefined reporting options also automatically adjust themselves as the years go by, so when run in calendar 2018, the above report would automatically begin with 2007 and end with 2018 (if you count the current year, the report actually has figures for 11 years, 10 of which have final figures). You may send the entire report to Excel for printing and/or further analysis by clicking on the To Excel button (or the ToCalc button in the online version of DonorQuest). The data may also be sent to a standard text file using the To File button.

To run Donor Metrics for a different pre-defined setting (or any custom settings you create), click on the drop-down list for Setup, like this:



For example, if you choose the, "Pre-Defined: Q4 Comparison Of Monthly Revenue, Current And Previous Calendar Year", you will see the date filters change like this:



These date ranges define both how many comparison columns the report will have, and the donations comprising the values for each column. Depending on the current year on which you are running any of the pre-defined setups, the actual time periods will automatically adjust. The display above is what the time periods would be if you were to run the Q4 Comparison when the current calendar year is 2018.

You can create your own custom Donor Metrics Reports by using any of the pre-defined setups as a starting point, and directly editing the time periods, adding and deleting time periods as needed. Click the Save button if you have created a custom setup you would

like to save and use again. It will be added to the Setup drop-down list below the pre-defined setups.

Repeat Donors

A repeat donor is someone who has given before, and is giving again. Once a donor makes their second gift, they are never again counted as a new donor in time periods which are beyond their first gift ever. In time periods which include their first gift ever, they will always contribute to the new donor count for that period, even if they also have a second gift that's also in the period. It is possible for a single donor to be counted both as a new donor and a repeat donor if the time period is broad enough to encompass both their first and second gifts. A single donor will never be double-counted as a repeat donor, no matter how many donations they have in the period. They may only contribute to the repeat donor count for a given period once.

If someone gave in 2014, not in 2015, and then again in 2016, they would still be a repeat donor in 2016. However, if you ran Donor Metrics for 2014, they would still be counted there as a new donor. Their first gift ever anchors their new donor status to the date of their first gift.

If the time range for one of the Donor Metrics columns covers both a new donor's 1st and 2nd gift, they will count in both categories. For example, let's say John Smith gave his 1st gift ever on 01/05/16, and then gave again on 01/15/16. For the month of JAN 16, he would be counted both as a new donor and as a repeat donor. However, if he gave a third gift in JAN 2016, say on 01/20/16, he would not be double-counted in the Repeat Donor count for the month. His third gift would of course be counted in the "Total Number of Donations" and "Dollar Total Of Donations" for JAN 2016. The, "Total Number Of Donors", "Number Of New Donors", and "Number of Repeat Donors" count only unique donor ID's in the time periods.

A good way to learn more about how repeat donors are identified is to run your own tests by setting up a temporary test donor account, and add a test donation that's off in the future. As an example, if today were March 2016, add a donation to the test account with a date of 04/01/2016. Then run the Metrics report for, "Q2 Comparison Of Monthly Revenue, Current And Previous Calendar Year." You should see the 04/01/2016 donation trigger a 1 for the new donor count for APR 2016. If you add a second gift for the same test donor, say with a date of 04/05/2016, you will see that is counted as a 1 for the repeat donor count for APR 2016. However, adding a third gift for the test donor, say for 04/15/2016, will only change the donation count and dollar total columns for APR 2016.

5.19 The Dashboard

The DonorQuest Dashboard offers a live view of what's going on in your donor database from minute to minute. All of the displays within the dashboard are updated in realtime, so you may simply leave it open to continuously monitor the information which most interests you. The dashboard can be kept open along with other DonorQuest windows, allowing you to do your normal activities in DonorQuest while still monitoring events. It can also be

resized to suit your preferences and to fit nicely with whatever else you may have open in DonorQuest. Any preference changes you make to the dashboard will be saved under your user account, allowing you to have your own customized dashboard.

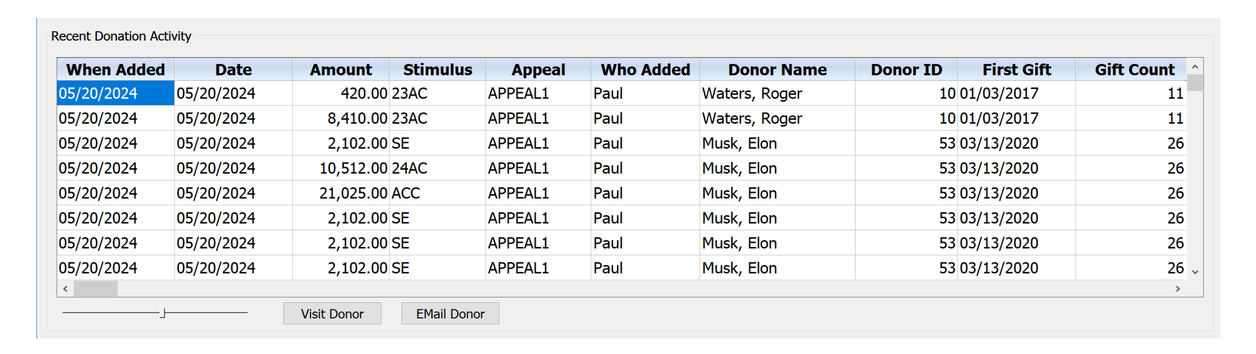
The dashboard display consists of grids and graphs. Some are donor-specific, and others are more statistical in nature, showing realtime totals across many donors. You may open the DonorQuest Dashboard at anytime by clicking the icon for it on the DonorQuest toolbar, which looks like this:



Here is a brief overview of the various displays within the dashboard:

Recent Donation Activity

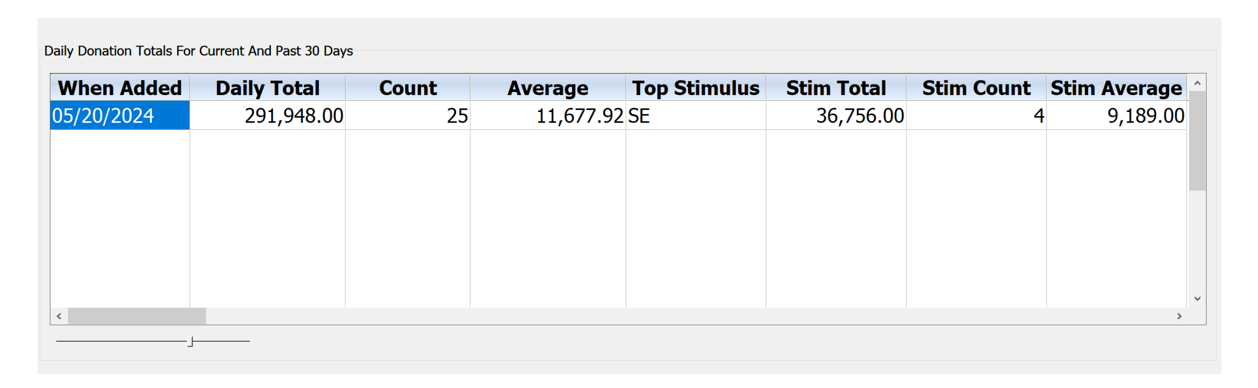
The Recent Donation Activity display is a running track of donations as they are entered. If you have multiple data entry people at work entering (or importing) donations, you will see them here as they hit the database. Below the grid are some controls - a horizontal slider to control the font size of the grid, and a couple buttons. The Visit Donor button will automatically position you at the donor's record in the main data windows so that you can see full details about any of the donors who just had a donation added. The dashboard window will stay open alongside the main data windows so that they may be used in combination. There is also an Email Donor button which will allow you to compose and send an email right on the spot to a donor if you wish. If you are a campaign manager and you happen to know a donor who just gave a large gift, you could thank them immediately and personally! In total, the Recent Donation Activity grid has the following columns: When Added (actual date donation added), Date (date assigned to donation), Amount, Stimulus, Appeal, Who Added, Donor Name, Donor ID, First Gift, Gift Count (lifetime), Life Total, Address, City, State, Zip, Phone, Primary Email, Donor Type, Fund (for donation), Type, Account, Thank-You Letter, and Comment. Here is what the Recent Donation Activity display looks like:



When Added	Date	Amount	Stimulus	Appeal	Who Added	Donor Name	Donor ID	First Gift	Gift Count
05/20/2024	05/20/2024	420.00	23AC	APPEAL1	Paul	Waters, Roger	10	01/03/2017	11
05/20/2024	05/20/2024	8,410.00	23AC	APPEAL1	Paul	Waters, Roger	10	01/03/2017	11
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	10,512.00	24AC	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	21,025.00	ACC	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26

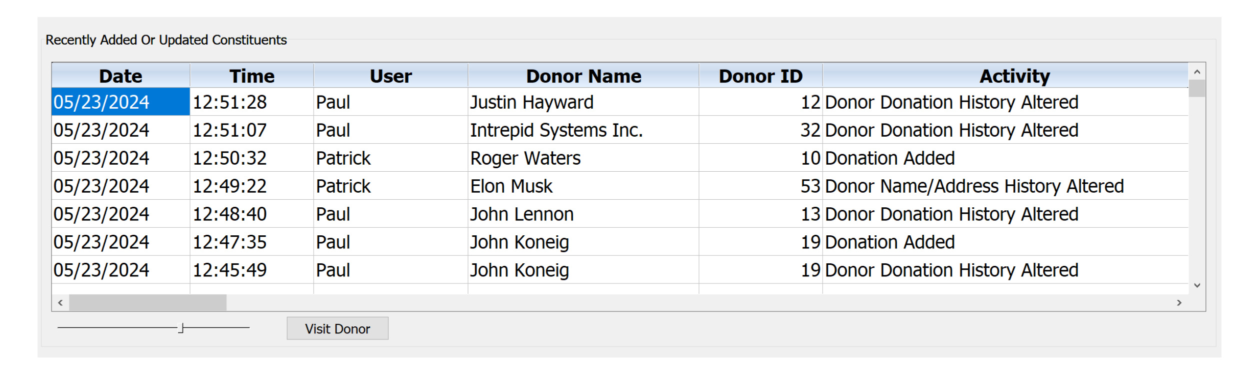
Daily Donation Totals For Current And Past 30 Days

This dashboard display is intended to give you a summary of daily revenues for the current and past 30 days. It provides a quick way to get a handle on your day-to-day entry volume and revenues. It shows a daily total, gift count, and average by actual entry date (not the given donation date, though they are typically the same). Also shown is the top stimulus for each day by revenue, along with a gift count and average amount for the top stimulus. Here is what the display looks like:



Recently Added Or Updated Constituents

This dashboard display will show you all user actions affecting constituent records in realtime as they happen. If you need to investigate an event in more detail, simply click on the Visit Donor button. Here is what the display looks like:



Top One Hundred Donors

Initially this dashboard display will show you your top 100 donors based on lifetime giving. But using the Stimulus selector, you can monitor your top 100 donors for a specific stimulus code. There's also a Rank By selector which allows you to choose between Total Giving and Largest Single Gift. This is used in combination with the Stimulus selector to filter the donors who makes it into your top ten list. You may also order the display by any column by clicking on the title for the column you wish to order on. Clicking repeatedly will toggle between ascending and descending order. There is also a Visit Donor button which you may use to view all information about a specific donor via the DonorQuest Main Information windows, which can be open at the same time as the dashboard, working together to keep all information at your fingertips. Here is the Top One Hundred Donors display looks

like:

Top One Hundred Donors

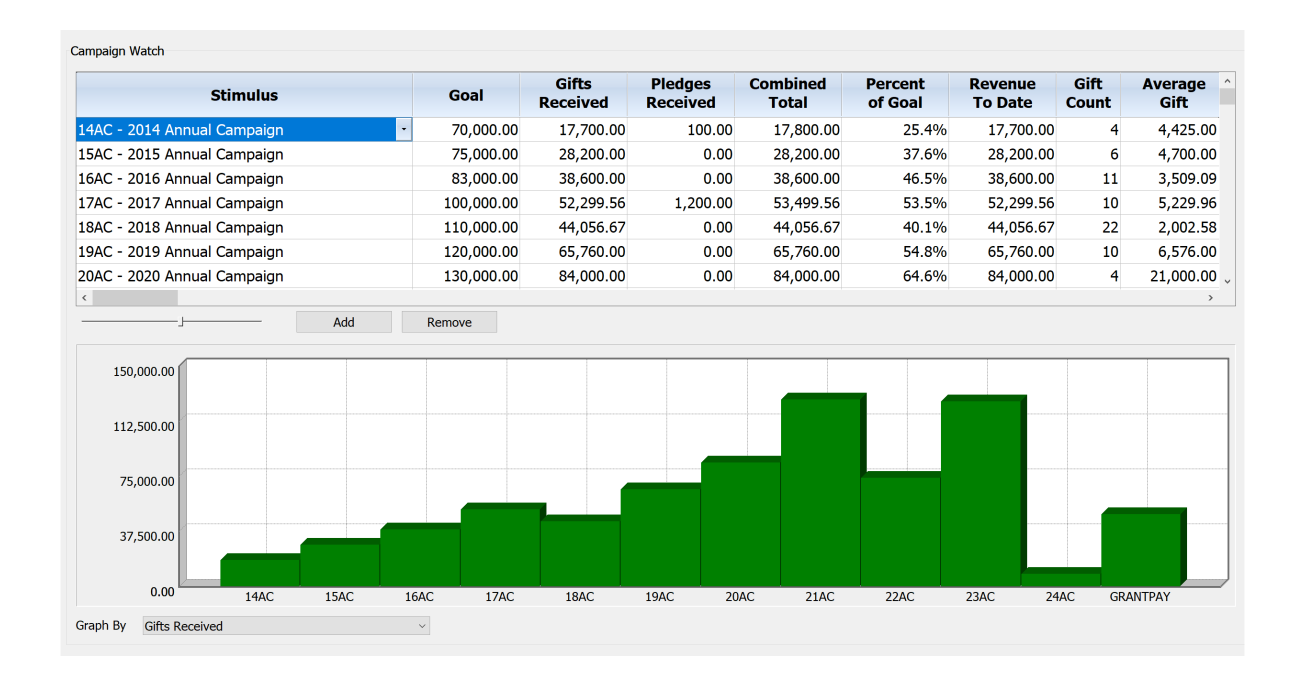
Donor Name	Donor ID	Total Giving	Largest Gift	Gift Count	First Gift	Last Updated
Northern Songs Limited, (U.S. Division)	29	345,776.00	70,000.00	15	03/31/2011	05/22/2024
The Corporation For Public Broadcasting	27	318,675.00	105,125.00	6	02/28/2022	05/22/2024
Musk, Elon	53	141,812.00	21,025.00	26	03/13/2020	05/23/2024
Hayward, Justin	12	128,470.00	20,395.00	40	01/24/2002	05/23/2024
Gore, Martin L.	4	53,610.00	30,450.00	8	10/10/2017	05/22/2024
Bowie, Denise	18	50,967.00	17,765.00	7	03/22/2018	05/22/2024
Intrepid Systems Inc.	32	42,457.00	5,000.00	32	01/24/2004	05/23/2024

Visit Donor Stimulus All Rank By Total Giving

Campaign Watch

The Campaign Watch is a combined grid and graph display showing campaign (stimulus) totals. Note that campaigns are driven by stimulus codes in DonorQuest, and there is normally a one-to-one correspondence (so when you see Stimulus, just think Campaign). The graph is linked to the grid so that any changes you make to your preferences in the grid are immediately reflected in the graph, including when you order the grid in ascending or descending order by any of the columns. You may use the Add and Remove buttons to add or remove rows from the grid, and the drop-down arrow in the stimulus column can be used to change the stimulus being monitored. After adding a new row, you need to select the Stimulus it should display information for. Directly below the Campaign Watch grid is the companion graph, showing totals by Stimulus. The horizontal axis of this graph will always show all chosen Stimulus codes from the grid, but you may control the vertical axis via the drop-down control you will see beneath the graph. This control will let you graph by any of the numeric columns of the grid for each Stimulus. Specifically you may choose to graph by Goal, Gifts Received, Pledges Received, Combined Total, Percent of Goal (achieved), Revenue To Date, Gift Count, Average Gift, Pledge Count, Average Pledge, Combined Count, and Combined Average.

Feel free to customize the display as much as you like since all changes are saved under your user account. This allows all DonorQuest users to have their own custom viewing preferences for all dashboard displays without interfering with the preferences of other users. Here is what the Campaign Watch display looks like:

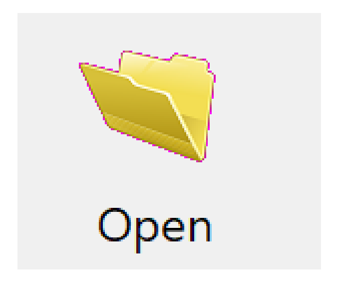


Appeal Watch

This Appeal Watch display within the dashboard is just like the Campaign Watch display, but deals with Appeals instead. Otherwise it has the same grid columns, corresponding graph, and functionality.

Topic VI

6 Entering Information



The most common daily use of DonorQuest will consist of adding donations to existing donors, and adding new donors. If you are new to DonorQuest you should review the Quick Start Guide chapter to familiarize yourself with the DonorQuest toolbar and basic entry forms. This topic will focus in more detail on the specific tables (donation, pledge, etc), and provide a complete discussion of the data fields within each table. It will also focus on the subtle nuances of the Find and Flex Find features, used for quickly finding existing donor and prospect records so that they may be updated with new donations or other updates.

The first step to adding new donors, updating information, adding new donations, etc. is always to open the data windows by clicking on the open icon of the DonorQuest toolbar (the very first icon on the left, also shown above). As with most relational databases, information in DonorQuest is organized in related tables. Each donor has a single master biographical record in what is called the Main Information or Header table. For each data table, there is a corresponding window you can open (and a corresponding icon on the DonorQuest toolbar). These windows look like spreadsheets, and are called datasheets.

Tables And Datasheets

All together, there are seven tables (and corresponding datasheet windows) in DonorQuest. They are Header, Donations, Pledges, Memos, Extra Addresses, Linkages, and Scheduled Contacts. While you can have all of the datasheet windows for these tables open at once, depending on your responsibilities you will likely only need to have three or four open at once. As you use DonorQuest, it learns about your preferences, and ties them to your DonorQuest user account. One of these preference is which datasheet windows you would like to have DonorQuest open when you click the Open icon. Once you determine the windows you will be using most often in data entry, you can click on User, Remember Your Open Windows. The next time you click the open icon, those same window will be opened for you. Other changes you make, such as window placement, size, column order and width, will all be remembered for you automatically.

You will notice that the datasheet windows all have some buttons in common -- Add, Edit, Delete, and Ok. These button all behave consistently. Here is a brief description of each:

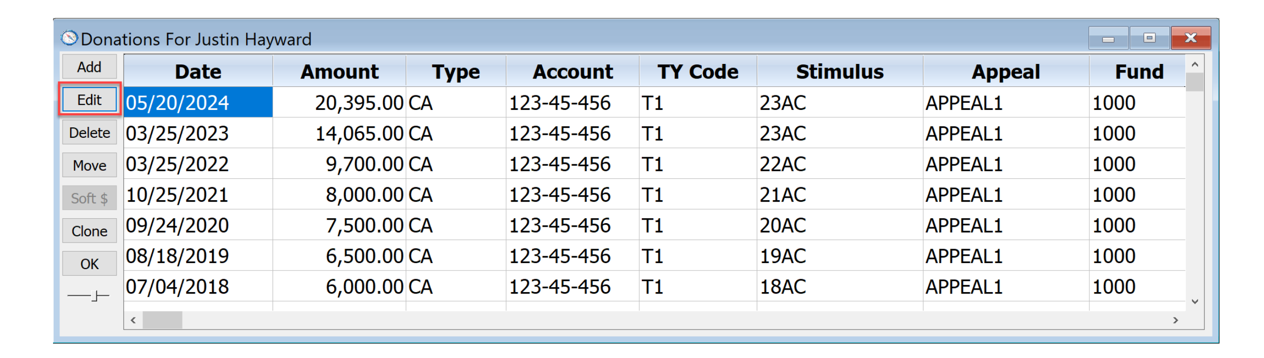
The Datasheet Add Button

The Add button will add another of whatever the current datasheet displays. If it is the add

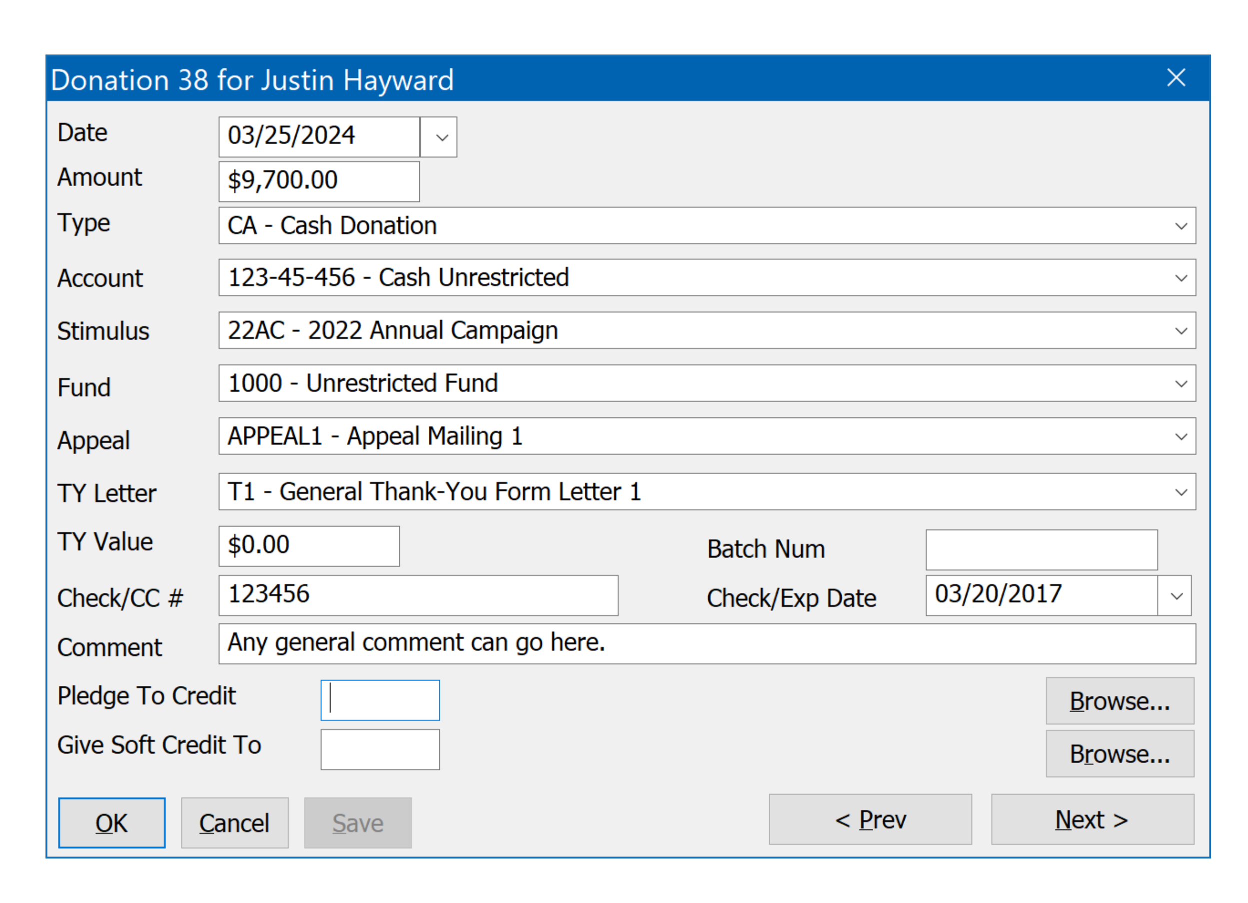
button of the main biographical datasheet, the add button will add a new donor (or prospect). Likewise the Add button on the donations datasheet will add a new donation for the current donor. When adding a new donor, donation, pledge, etc., an entry form will automatically open allowing you to type information. Once you save the information in this form, you will complete the creation of the new donor, donation, pledge, etc. and you will see the datasheet window automatically update to include the newly added row.

The Datasheet Edit Button

The Edit button will allow you to make changes to existing rows in a datasheet window. Clicking the Edit button will open a form identical to the one used to initially create a datasheet row, letting you make changes to the currently highlighted row in the corresponding datasheet. For example, if you have the donation datasheet open, clicking the Edit button will open the donation form, allowing you to make edit changes to the highlighted donation row. Here is an example:



Clicking on the Edit button in the above datasheet would "drill down" into the 03/26/2017 donation, expanding it into the following form which also allows you to make edit changes:



You can make any desired changes, then click the Ok button to save the changes and close the form. Clicking the Save button will save the changes, but keep the form open so that you may make additional changes.

The Datasheet Delete Button

The Delete button will delete the currently highlighted row of the datasheet. If the datasheet is the donation datasheet, this will delete a donation. However, if you click the Delete button of the Main Information datasheet, you will delete the currently highlighted donor record, along with all the related information in other tables. That is, all donations, pledges, etc. for the donor will also be deleted. Of course you will be given fair warning and asked for confirmation before a donor deletion is carried out. If a donor is deleted by mistake, they can be recovered using the Donor, Restore A Deleted Donor feature.

The Datasheet Ok Button

The Ok button simply closes the datasheet. If you close the Main Information datasheet, all other datasheets will also close. For standard data entry, the Main Information datasheet must always be open for any other related datasheets to be open.

Hiding Unneeded Columns

All of the data windows in DonorQuest will remember which columns you wish to see. To

turn on or off a column, position the mouse pointer within the title space for the columns on any datasheet and do a right-mouse-click. You will see a pop-up menu which allows you to turn on or off display of any column in the window, like this:

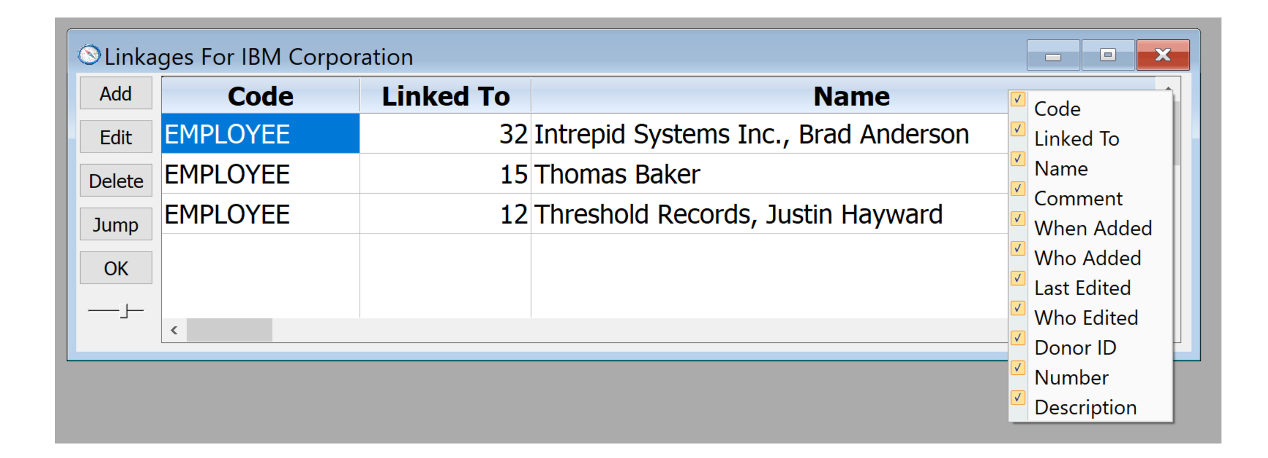


Table Hierarchy

DonorQuest is based on a relational database with the following hierarchy of tables:

- -Header (Master table with constituent name/address and other biographical info)
    - -Donations
    - -Pledges
    - -Memos
    - -Extra Addresses
    - -Linkages
    - -Scheduled Contacts

DonorQuest automatically manages the relationship between these tables for all queries and reports, so there's no query language you need to learn to use DonorQuest. You may reference any field from any table on any report, and DonorQuest will arrange and deliver the information from the multiple related tables as needed.

Data Dictionary

Following is a complete list of all the pre-defined data fields and the tables they belong to in DonorQuest. Note that fields are shown in the same order as they appear on the actual data entry forms and menus in DonorQuest.

Table	Field Name	Type	Width	Coded	Purpose
Header	Last_Name	Char	50	No	When the donor is an organization, the last name stores the last name of the

Table	Field Name	Type	Width	Coded	Purpose
					primary contact person for the organization. For individual donors, the last name field is simply the last name of the individual donor.
Header	First_Name	Char	30	No	When the donor is an organization, the first name stores the first name of the primary contact person for the organization. For individual donors, the first name field is simply the first name of the individual donor
Header	Middle_Name	Char	20	No	When the donor is an organization, the middle name stores the middle name or initial of the primary contact person for the organization. For individual donors, the middle name field is simply the middle name or initial of the individual donor.
Header	Organization_Name	Char	100	No	The organization name field should be used to store the business names (such as - IBM - or - Microsoft -) of corporate or organizational donors. For individual donors, the organization field is generally left blank unless the donor wishes to receive mail at their place of business.
Header	Other_Name	Char	40	No	An "also known as" or nickname for the donor.
Header	Salutation 1	Char	60	No	The primary purpose of the salutation fields are for reports and/or exporting to a mail merge. The first salutation field should be used for the formal salutation as you would want it to print on the envelope or above the address information in a thank you letter.
Header	Salutation 2	Char	60	No	The Salutation 2 field may be

Table	Field Name	Type	Width	Coded	Purpose
					used for an informal salutation, such as in the - dear - block in a letter. For example you could have Justin & Christine's record exported for your mail merge thank you letter to read, Dear Justin & Christine.
Header	Salutation 3	Char	60	No	This is an additional salutation field that can be used as needed.
Header	Title	Char	10	Yes	You may use this field to store the job title or occupation of the primary individual.
Header	Suffix	Char	10	Yes	A coded field storing the donor's name suffix, if any. Some examples are: - III -, - PhD -, -Senior -, - Junior -. Since this is a coded field, you would make
Header	Address	Char	40	No	Main Address Line 1
Header	Address 2	Char	35	No	Main Address Line 2
Header	Print 2nd Name First	Char	1	No	Check Box set true if spousal/ partner name is to be printed first on mailing labels. Note that most labels draw on the salutation fields, and their use and the use of the salutation fields is preferred.
Header	ID Num	Num	12	No	Unique ID number of each donor, used to relate all tables.
Header	City	Char	50	No	City of main address
Header	State	Char	2	No	State of main address
Header	Zip	Char	10	No	Zip / Postal Code of main address
Header	County	Char	25	No	County of main address
Header	Carrier Route	Char	10	No	Carrier route of main address, used for postage discounts
Header	Country	Char	10	Yes	Country of main address
Header	Inactive	Char	1	No	Check box set to true if donor is inactive
Header	Bad Address	Char	1	No	Check box set true if main

Table	Field Name	Type	Width	Coded	Purpose
					address if found to be incorrect because of returned mail or an automated batch import of verified addresses by 3rd party
Header	Do Not Solicit	Char	1	No	Check box set true if donor is not to be contacted for solicitations
Header	Do Not Acknowledge	Char	1	No	Check box set true if donor is not to be acknowledged with a thank-you letter for their gifts
Header	Telephone	Char	25	No	Main telephone number for primary donor
Header	Work Phone	Char	25	No	Work phone number for primary donor
Header	Fax Phone	Char	25	No	Fax phone number for primary donor
Header	Mobile Phone	Char	25	No	Mobile phone number for primary donor
Header	EMail	Char	60	No	EMail address for primary donor
Header	Web Address	Char	50	No	Web address used mainly for organizational donors
Header	Gender	Char	1	Yes	Gender of primary donor
Header	Birthday	Date	8	No	Birthday of primary donor, including birth year if known
Header	Deceased Date	Date	8	No	Date of primary donor's death if deceased. Donor account should also be set to Inactive status if a date is entered here.
Header	Anniversary	Date	8	No	The Anniversary date for the primary contact and spouse stored in the secondary name fields.
Header	Marital Status	Char	10	Yes	Marital status of donor. Coded field, allowing new codes to be defined as needed.
Header	School Attended	Char	10	Yes	University attended
Header	Major	Char	10	Yes	Degree program or area of study for primary donor
Header	GPA	Char	10	Yes	College Grade Point Average

Table	Field Name	Type	Width	Coded	Purpose
Header	Degree	Char	10	Yes	Degree held if any
Header	Graduation Date	Date	8	No	College graduation date
Header	Job Title	Char	10	Yes	Professional title
Header	Primary SSN	Char	11	No	Social Security number of primary donor
Header	Target Annual Revenue	Char	12	Yes	Target annual giving for donor or couple
Header	Annual Income	Num	12	No	Annual income if known for donor or couple
Header	Secondary Last Name	Char	20	No	Spouse or partner job title
Header	Secondary First Name	Char	15	No	Spouse or partner First Name
Header	Secondary Middle Name	Char	15	No	Spouse or partner Middle Name
Header	Secondary Birth Date	Date	8	No	Spouse or partner Birth Date
Header	Secondary Deceased Date	Date	8	No	Date spouse or partner became deceased
Header	Secondary Gender	Char	1	No	Gender of spouse or partner
Header	Secondary Job Title	Char	10	No	Spouse or partner Job Title
Header	Secondary Other Name	Char	60	No	Spouse or partner AKA or nick name
Header	Secondary SSN	Char	11	No	Spouse or partner Social Security Number
Header	Secondary Suffix	Char	10	Yes	Spouse or partner Suffix code
Header	Secondary Title	Char	10	Yes	Spouse or partner Title code
Header	Secondary Telephone	Char	25	No	Spouse or partner main telephone number
Header	Secondary Work Phone	Char	25	No	Spouse or partner work phone
Header	Secondary Fax Phone	Char	25	No	Spouse or partner fax phone
Header	Secondary Mobile Phone	Char	25	No	Spouse or partner mobile phone
Header	Secondary EMail	Char	60	No	Spouse or partner EMail address
Header	Secondary Web Address	Char	60	No	Spouse or partner website address
Header	Note Pad	Char	No Limit	No	You may enter free-form notes about each donor in paragraph form. The notepad feature lets you enter many paragraphs of text about each donor in a word processor-like window which

Table	Field Name	Type	Width	Coded	Purpose
					does automatic paragraph formatting. The full text of all notepad entries across all donors is available for keyword searches during selections, and you can also include each donor's notepad text on any report.
Header	List 1	Char	10	Yes	Used to store donor source code or - tag - information. List codes are basically used to - tag - a given donor in some way or other. For example, you may use the list codes to specify the list from which you got the donor's name. Establishing list codes makes it very easy to select subgroups of donors for specialized mailings. Up to ten list codes may be stored for each donor. All ten list fields share the same drop-down list of possible code values. As with any coded field, you may create new list codes as needed.
Header	List 2	Char	10	Yes	
Header	List 3	Char	10	Yes	
Header	List 4	Char	10	Yes	
Header	List 5	Char	10	Yes	
Header	List 6	Char	10	Yes	
Header	List 7	Char	10	Yes	
Header	List 9	Char	10	Yes	
Header	List 10	Char	10	Yes	
Header	Profile 1	Char	10	Yes	Used to store donor profile codes -- information about clubs, boards, memberships, special interests, occupations, alumni information, etc. Up to five profile codes may be stored.
Header	Profile 2	Char	10	Yes	

Table	Field Name	Type	Width	Coded	Purpose
Header	Profile 3	Char	10	Yes	
Header	Profile 4	Char	10	Yes	
Header	Profile 5	Char	10	Yes	
Header	Donor Type	Char	10	Yes	Type of Donor - Normally "I" for individuals, or any other coding to indicate corporations/ organizations.
Header	Address Type	Char	10	Yes	Type of address main address is, i.e. Home, Work.
Header	Division	Char	10	Yes	Division codes provide a place to break your donor accounts into more detailed groups. This may be especially helpful during a capital campaign.
Header	Solicitor	Char	10	Yes	This is an older field used to store a code for a single solicitor. It's function has been replaced by the more flexible linkages table which supports many-to-many relationships of different types.
Header	Code	Char	10	Yes	Generic Coded field
Header	Rank	Char	10	Yes	Generic Coded field
Header	Club	Char	10	Yes	Generic Coded field
Header	Spring	Char	1	Yes	Check box set true if donor is to receive Spring mailings
Header	Holiday	Char	1	Yes	Check box set true if donor is to receive Holiday mailings
Header	Newsletter	Char	1	Yes	Check box set true if donor is to receive Newsletter mailings
Header	Relationship Between Primary And Secondary	Char	10	Yes	Code for type of relationship between primary and secondary names
Header	#_Donations	Num	6	No	Total number of Donations for each donor
Header	#_Pledges	Num	6	No	Total number of Pledges for each donor
Header	#_Memos	Num	6	No	Total number of Memos for each donor
Header	#_Extra_Addresses	Num	6	No	Total number of Extra

Table	Field Name	Type	Width	Coded	Purpose
					Addresses for each donor
Header	#_Solicitations	Num	6	No	Total number of Solicitations sent to each donor
Header	#_Linkages	Num	6	No	Total number of Linkages for each donor
Donations	Donation Date	Date	8	No	Official date donation received
Donations	Donation Amount	Num	12	No	Amount of donation
Donations	Donation Type	Char	10	Yes	Type of donation - Cash, Check, or non-monetary types such as LB for pounds or HR for hours
Donations	Donation Pledge Stimulus Link	Num	12	Yes	No Longer Used
Donations	Donation Account	Char	20	Yes	Deposit account for donation
Donations	Donation Stimulus	Char	15	Yes	Why donor gave donation. AKA Campaign Code
Donations	Donation Fund	Char	15	Yes	How donation is to be spent within your organization.
Donations	Donation Appeal	Char	15	Yes	Appeal donor responded to
Donations	Donation TY Code	Char	10	Yes	Thank-you letter to use for gift
Donations	Donation TY Value	Num	12	No	Any value a donor got back in return for donation - normally zero but could be the actual cash value of a dinner a donor paid to attend, for example.
Donations	Donation Comment	Char	150	No	General comment for donation
Donations	Donation Soft Link	Num	12	No	ID of donor account to receive soft credit for donation
Donations	Donation Number	Num	10	No	ID for donation, unique within donor account. Donations are numbered 1..n in ascending chronological order by Donation Date, where 1 is assigned to each donor's first donation.
Donations	Donation Batch Number	Num	10	No	Batch number for donation, used in batch entry of donations under Donor, Batch Donation Entry
Donations	Donation Receipt Number	Num	10	No	System-generated unique receipt number for each donation

Table	Field Name	Type	Width	Coded	Purpose
Donations	Donation Check Number	Char	25	No	Check number for donation, or credit card number.
Donations	Donation Check Date	Date	8	No	Check date / credit card expiration date
Donations	Donation When Added	Date	8	No	Actual date donation was entered - system-generated
Donations	Donation Who Added	Char	25	No	User name of person who added donation to DonorQuest
Donations	Donation When Acknowledged	Date	8	No	Date donation acknowledgement letter sent
Donations	Donation Acknowledgment ID	Num	12	No	No longer used
Donations	Donation When Last Edited	Date	8	No	System-maintained date, when donation last edited
Donations	Donation Who Last Edited	Char	25	No	System-maintained, user name of person last making change to donation
Donations	Donation Pledge ID Link	Num	4	No	ID number of pledge if donation is a pledge payment
Donations	Donation Parent ID	Num	12	No	Donor ID
Donations	Donation Child ID	Num	12	No	Globally unique record number for donation
Pledges	Pledge Start Date	Date	8	No	Start date for pledge
Pledges	Pledge Stop Date	Date	8	No	End date for pledge
Pledges	Pledge Account	Char	20	Yes	Deposit account for monies from pledge
Pledges	Pledge Stimulus	Char	15	Yes	Why pledge was made - AKA Campaign code
Pledges	Pledge Fund	Char	15	Yes	How pledge is to be spent
Pledges	Pledge Appeal	Char	15	Yes	Which appeal the donor responded to in making the pledge
Pledges	Pledge Type	Char	15	Yes	Type of pledge - Cash, Check, or non-monetary types such as LB for pounds or HR for hours
Pledges	Pledge Amount	Num	12	No	Amount of pledge
Pledges	Pledge Amount Paid	Num	12	No	Amount paid so far on pledge
Pledges	Pledge Payment Amount	Num	12	No	Amount of payment scheduled to be made at regular intervals

Table	Field Name	Type	Width	Coded	Purpose
Pledges	Pledge Payment Frequency	Num	3	No	Interval for payments - monthly, quarterly, semester, yearly
Pledges	Pledge Comment	Char	150	No	General comment for pledge
Pledges	Pledge Automatic Renewal	Char	1	No	Check box set true if pledge is for membership which automatically renews
Pledges	Pledge Renewed	Char	1	No	True if pledge was automatically generated as part of a renewal
Pledges	Pledge Written Off	Char	1	No	True if pledge was not honored and had to be written off
Pledges	Pledge Number	Num	4	No	Unique ID for pledge within donor account
Pledges	Pledge Matching Gift Donation Receipt Number	Num	10	No	Receipt number of donation from another donor account which caused pledge to be automatically generated via the matching gift feature of linkages
Pledges	Pledge Matching Gift Percentage	Num	3	No	When pledge is automatically generated as the result of a matching gift, percentage of original gift
Pledges	Pledge When Last Edited	Date	8	No	System-maintained date, when pledge last edited
Pledges	Pledge When Added	Date	8	No	System-maintained date for when pledge added
Pledges	Pledge Who Last Edited	Char	25	No	System-maintained, user name of person last making change to pledge
Pledges	Pledge Parent ID	Num	12	No	Donor ID
Pledges	Pledge Child ID	Num	12	No	Globally unique record number for pledge
Memos	Memo Code	Char	10	Yes	Memo Code, serving to label data in Memo Text, much like a user-defined field name labels the data it contains. For example, you could define a standard memo code of HOBBY to indicate that the Memo Text field stores a description of the donor's favorite hobby.

Table	Field Name	Type	Width	Coded	Purpose
Memos	Memo Text	Char	100	No	Text associated with Memo Code.
Memos	Memo Number	Num	4	No	Unique ID for memo within each donor's account
Memos	Memo When Last Edited	Date	8	No	System-maintained date when memo last edited
Memos	Memo Who Last Edited	Char	25	No	System-maintained, user name of person last editing memo
Memos	Memo Parent ID	Num	12	No	Donor ID
Memos	Memo Child ID	Num	12	No	Globally unique record number for memo
Extra Address	XA Last Name	Char	40	No	Extra Address Last Name
Extra Address	XA First Name	Char	30	No	Extra Address First Name
Extra Address	XA Second Name	Char	40	No	Extra Address Nick Name
Extra Address	XA Salutation	Char	60	No	Extra Address Salutation (Used on mailing labels)
Extra Address	XA Address	Char	40	No	Main address line for each extra address
Extra Address	XA Address 2	Char	35	No	Second address line for each extra address
Extra Address	XA City	Char	30	No	Extra Address City
Extra Address	XA State	Char	2	Yes	Extra Address State
Extra Address	XA Zip	Char	10	No	Extra Address Zip / Postal Code
Extra Address	XA Carrier Route	Char	8	No	Extra Address Carrier Route (for postal discounts)
Extra Address	XA Telephone	Char	25	No	Extra Address Telephone
Extra Address	XA Code	Char	10	Yes	Type of Extra Address, i.e. Summer, Office, Winter
Extra Address	XA Misc	Char	30	No	Miscellaneous Notes about extra address
Extra Address	XA Start Date	Date	8	No	Start date for which extra address is valid and may be automatically substituted for

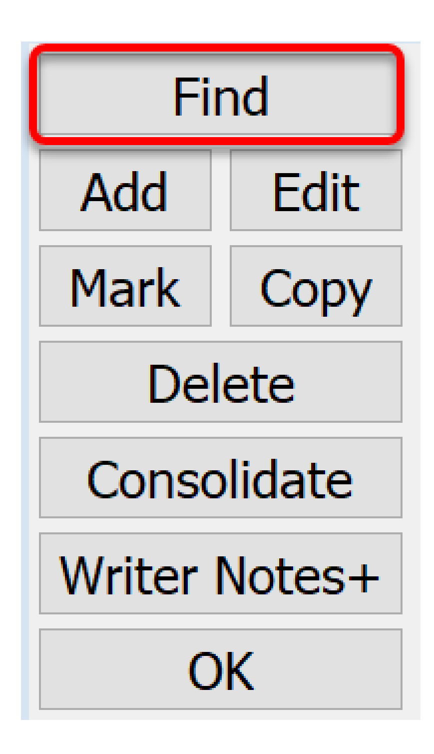
Table	Field Name	Type	Width	Coded	Purpose
					main address on labels and some data exports
Extra Address	XA End Date	Date	8	No	End date for which extra address is valid and may be automatically substituted for main address on labels and some data exports
Extra Address	XA Ignore Years	Char	1	No	Check box set true if years in start and end dates are to be ignored, meaning a seasonal address that is valid in subsequent years for the same period
Extra Address	XA When Last Edited	Date	8	No	When extra address record was last edited
Extra Address	XA Who Last Edited	Char	25	No	User name of last person to edit extra address record
Extra Address	XA When Added	Date	8	No	Date Extra Address was added
Extra Address	XA Who Added	Char	25	No	User name of person who added the extra address
Extra Address	XA Parent ID	Num	12	No	Donor ID
Extra Address	XA Child ID	Num	12	No	Globally unique record number for Extra Address
Linkages	Linkage Linked To	Num	12	No	Donor ID of the linked donor account
Linkages	Linkage Relation Type	Char	10	Yes	Type of relationship for the linked donor
Linkages	Linkage Comment	Char	80	No	Comment about the relationship
Linkages	Linkage When Last Edited	Date	8	No	When linkage last edited
Linkages	Linkage Who Last Edited	Char	25	No	User name of person who last edited linkage
Linkages	Linkage When Added	Date	8	No	When linkage was added
Linkages	Linkage Who Added	Char	25	No	User name of person who added the linkage
Linkages	Linkage Parent ID	Num	12	No	Donor ID
Linkages	Linkage Child ID	Num	12	No	Globally unique record number for linkage

Table	Field Name	Type	Width	Coded	Purpose
Contacts	SC_User_Name	Char	25	No	User name of person which the scheduled contact is for
Contacts	SC Description	Char	150	No	Short description of contact
Contacts	SC_Action	Char	10	Yes	Type of action item contact is for
Contacts	SC_Notes	Char	No Limit	No	Detailed notes about interaction with donor concerning subject of contact
Contacts	SC Date	Date	8	No	Date contact initiated
Contacts	SC_Last_Contact	Date	8	No	Date donor last contacted concerning subject of contact
Contacts	SC_Status	Char	1	No	Open or closed (stored as O or C in the database).
Contacts	SC_Grant_Type	Char	10	Yes	For contacts servicing grants, type of grant
Contacts	SC_Grant_Date_Request Made	Date	8	No	When grant submitted to grantor for consideration
Contacts	SC_Grant_Date_Request Acknowledged	Date	8	No	When grantor acknowledged receiving request
Contacts	SC_Grant_Date_Decision_Made	Date	8	No	When grantor made a decision about whether or not to fund grant request
Contacts	SC_Grant_Date_Payment Is Due	Date	8	No	When grant payment is due if funded
Contacts	SC_Grant_Status	Char	10	Yes	Grant status, i.e. accepted, declined, etc.
Contacts	SC_Grant_Amount_Requested	Num	12	No	Amount of grant requested
Contacts	SC_Grant_Amount_Granted	Num	12	No	Amount granted
Contacts	SC_Grant_Amount_Paid	Num	12	No	Amount paid to date on amount granted
Contacts	SC_Grant_Donation_Payment_Link	Num	15	Yes	Corresponds to Donation_Stimulus code for donations which are grant payments
Contacts	SC When Last Edited	Date	8	No	When grant last edited
Contacts	SC_Who_Last_Edited	Char	25	No	User name of person last editing grant
Contacts	SC Parent ID	Num	12	No	Donor ID

Table	Field Name	Type	Width	Coded	Purpose
Contacts	SC_Child_ID	Num	12	No	Globally unique record number for contact
Header	First Donation Amount	Num	12	No	Amount of first monetary gift for donor
Header	First Donation Date	Date	8	No	Date of first monetary gift for donor
Header	Most Recent Donation Amount	Num	12	No	The amount of each donor's most recent monetary donation
Header	Most Recent Donation Date	Date	8	No	The date of each donor's most recent monetary donation
Header	Most Recent Solicitation Date	Date	8	No	The date of the most recent solicitation sent to the donor
Header	Most Recent Solicitation Event Code	Char	20	No	The Event Code of the most recent solicitation sent to the donor
Header	Donation Total	Num	12	No	Each donor's lifetime monetary giving total
Header	Donation Total For Current Year	Num	12	No	Each donor's calendar year to date monetary giving total
Header	Donation_Total_For_Calendar_Year_1_Year_Ago	Num	12	No	Each donor's yearly monetary giving total for year, 1 year ago
Header	Donation_Total_For_Calendar_Year_2_Years_Ago	Num	12	No	Each donor's yearly monetary giving total for year, 2 years ago
Header	Donation_Total_For_Calendar_Year_3_Years_Ago	Num	12	No	Each donor's yearly monetary giving total for year, 3 years ago
Header	Best_Calendar_Year	Num	4	No	Best calendar year of giving for each donor
Header	Best_Calendar_Year_Total	Num	14	No	Total giving for donor's best calendar year
Header	Donation_Total_For_Current Fiscal Year	Num	14	No	Each donor's fiscal year to date monetary giving total
Header	Donation_Total_For_Fiscal Year 1 Year Ago	Num	14	No	Each donor's yearly monetary total for fiscal year, 1 year ago
Header	Donation_Total_For_Fiscal Year 2 Years Ago	Num	14	No	Each donor's yearly monetary total for fiscal year, 2 years ago
Header	Donation_Total_For_Fiscal Year 3 Years Ago	Num	14	No	Each donor's yearly monetary total for fiscal year, 3 years ago

Table	Field Name	Type	Width	Coded	Purpose
Header	Best_Fiscal_Year	Num	4	No	Best fiscal year of giving for each donor
Header	Best_Fiscal_Year_Total	Num	14	No	Total giving for donor's best fiscal year
Header	Average_Donation_Amount	Num	12	No	Average monetary lifetime donation amount for each donor
Header	Greatest_Donation	Num	12	No	Greatest monetary donation ever given by each donor
Header	Last_Date_Edited	Date	4	No	Date any attribute of donor's account was last changed, including when new related records (i.e. donations) were added.
Header	Who_Last_Edited	Char	25	No	User name of person last making a change to donor's account
Header	When_Donor_Added	Date	8	No	Date the donor account was created
Header	Giving Entity	Char	No Limit	No	Computed field, either primary last and first name, or organization name, depending on Donor Type code.
Header	Who_Added_Donor	Char	25	No	User name of person who added donor account

6.1 Finding Donor Records

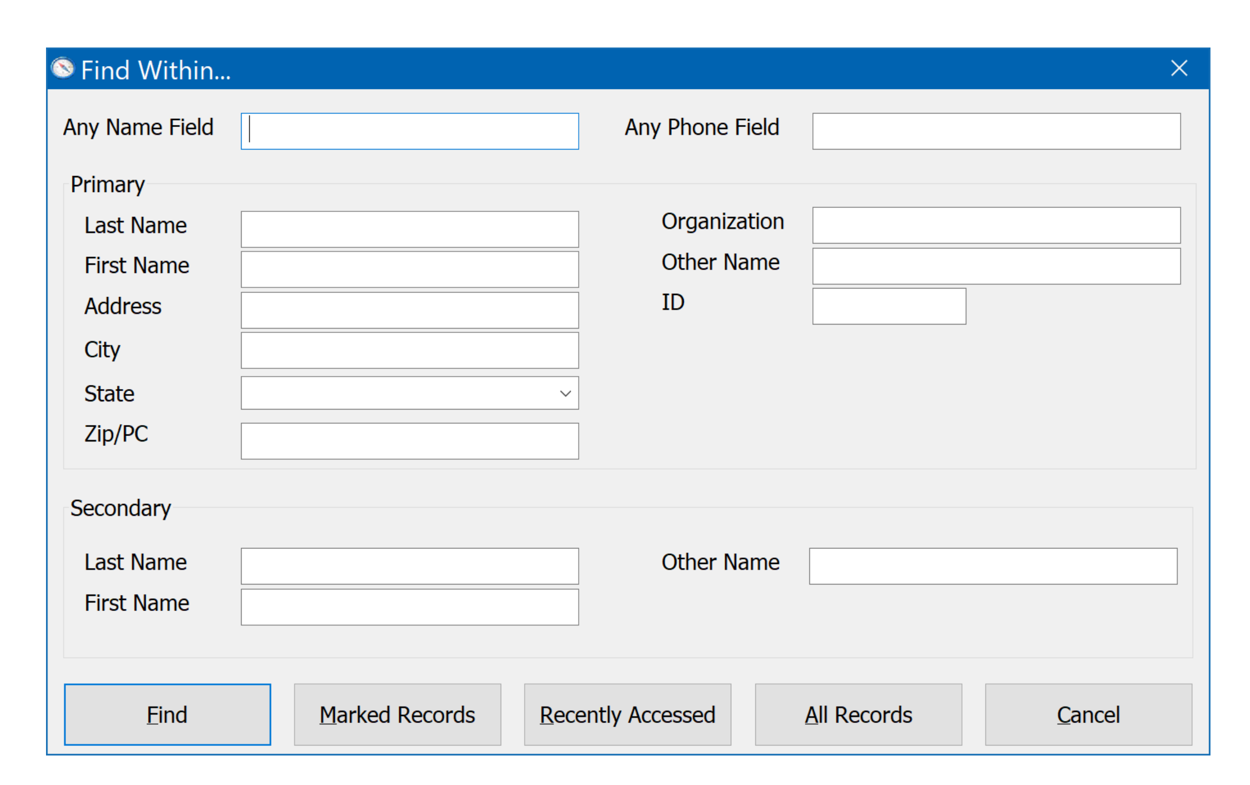


Once you have opened the datasheet windows you need to work with, you will typically need to find specific donor records to perform routine data entry operations on, such as adding new donations. Donor records can be found by one of three ways, using the Find button, the Google-like Flex Find method, or an incremental search in which the main information datasheet is updated as you type the letters or a last name, first name, organization name, etc., getting closer and closer to the target donor with each keystroke. For routine searching, the Flex Find method is preferred for the power and simplicity it offers.

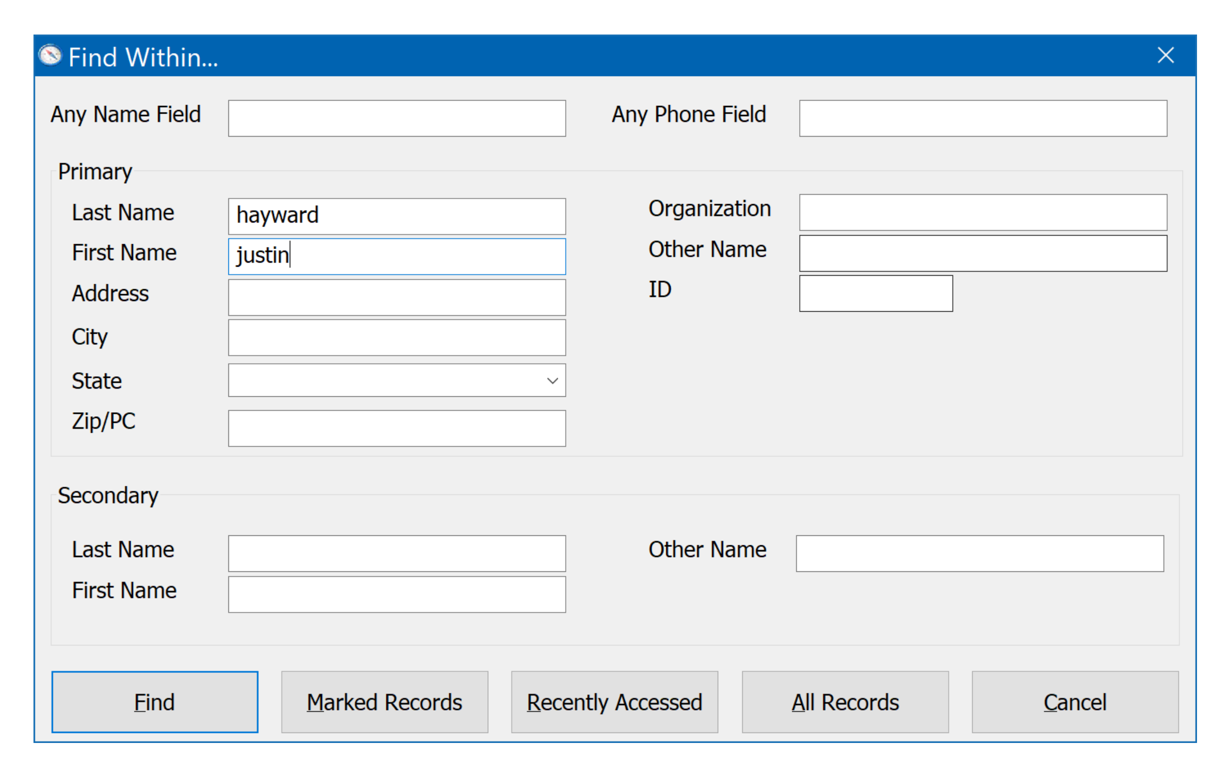
The basic Find feature allows you to search for donors by any combination of primary or secondary last name, first name, and other name, as well as organization name, address, phone, city, state, zip, and ID number. In addition, you can search by partial names and addresses, or even by names and addresses for which you are not sure of all the letters. When searching with the Find button, DonorQuest is not case sensitive. That is, it does not matter whether or not you correctly capitalize the name of the donor you wish to search for. For example, if you are searching for a donor by the last name of Hayward, you can enter the name as hayward or HAYWARD or even HaYwArD and the result will be the same. Here is an example:

Find Button

Click the Find button. The following window will appear:

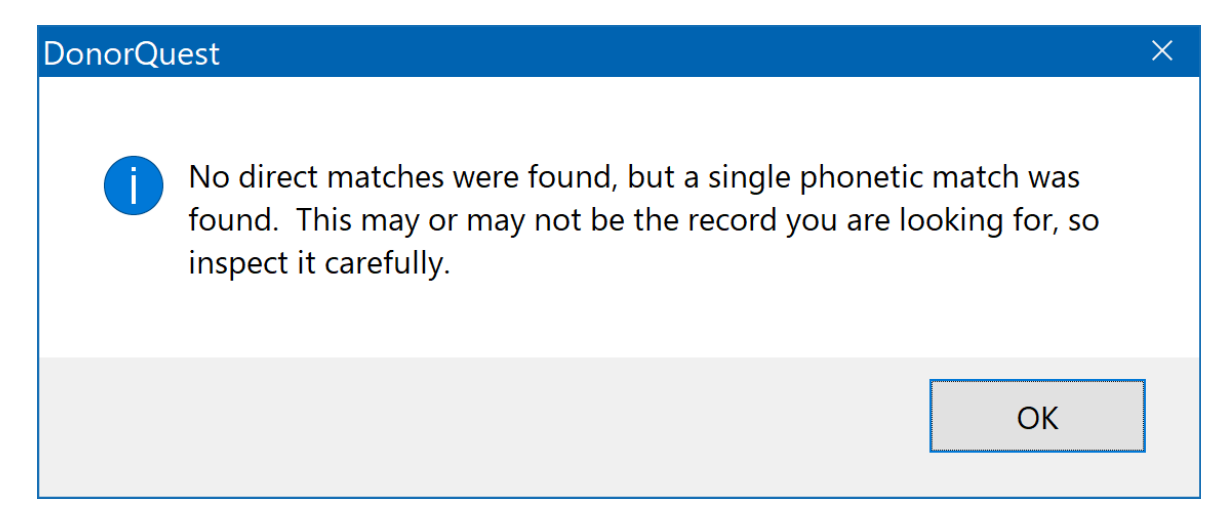


Let's say you want to find Justin Hayward. Enter Hayward in the Last Name blank, and Justin in the First Name blank like this and click Find:



But you could also enter simply Hay for the Last Name and Just to save time. The trick is to type something unique enough that you do not get back a lot of matching records. If DonorQuest is unable to find any existing records based on what you typed, then either

the donor does not exist, or you typed the name incorrectly. In some cases DonorQuest will try and phonetically sound out what you typed and look for matching records, and it will tell you when it finds one or more matches using this technique. You will see a message like this:



So, for example, if you spelled Hayward as Haywerd by mistake, DonorQuest will still likely find the correct record using phonetic matching. If DonorQuest finds one or more names which comply with your search, the main information window will be updated to display only the matching names. You may then highlight the donor you wish to work with. If a search results in more names than can be shown at once, you may use the scroll bar on the right hand side of the Main Information datasheet to scroll down and examine the full list of matching names (or simply press the down arrow on your keyboard). You can also order the result by any column of the Main Information datasheet by clicking on the title for the column.

The Following example illustrates how to do partial name searches:

Goal

You wish to recall the history for donor John Smith who lives at 4321 Another Smith Way.

Challenge

Smith is a very common last name, and John is a very common first name. There may be hundreds of donors named John Smith on file. It would be preferable not to have to type the entire address 4321 Another Smith Way to identify which John Smith you want.

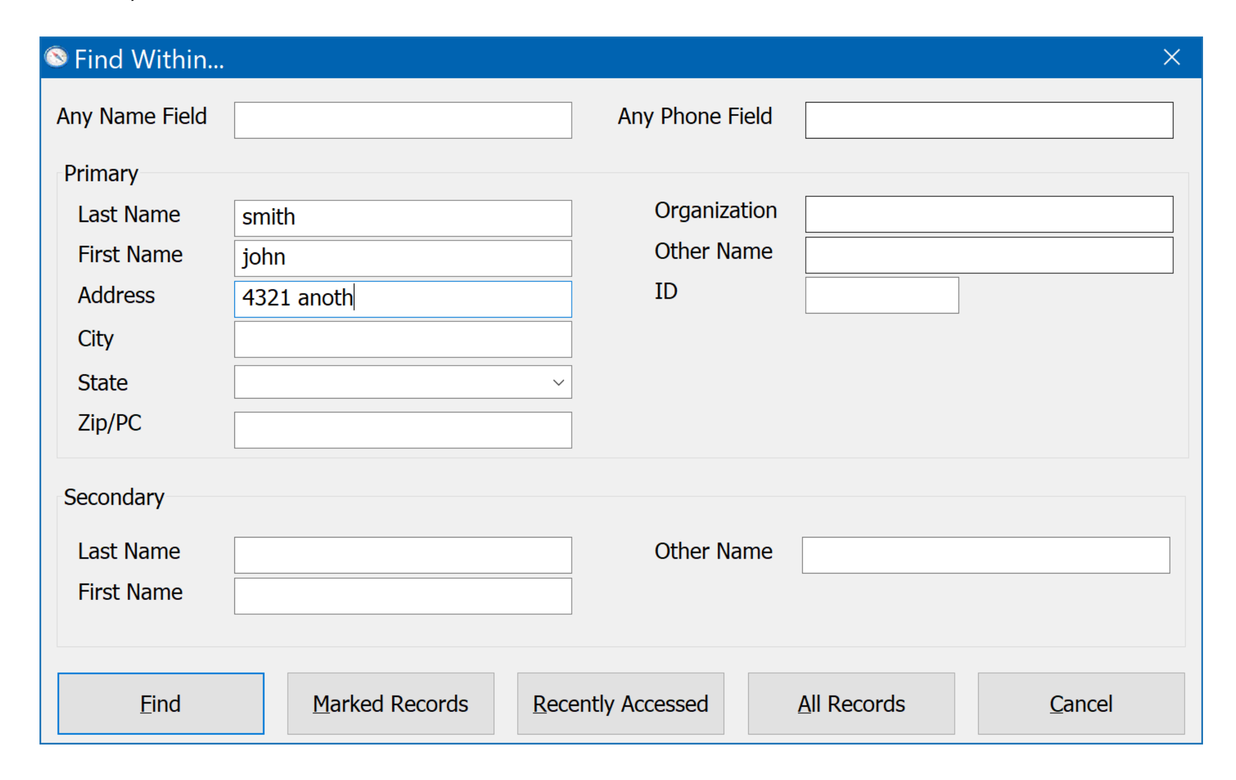
Solution

Search by last name, first name, and partial address.

Procedure

1) Click on the Find button inside of the main information window.
2) Enter Smith for the last name.

3) Enter John for the first name.
4) Enter 4321 Anoth for the address.
5) Click the Find button inside the find window.



In the above example, all three pieces of information (last name, first name, and partial address) were used to locate the specific donor. You could also have used partial names for the last and first name fields by entering Smi for the last name and Jo for the first name.

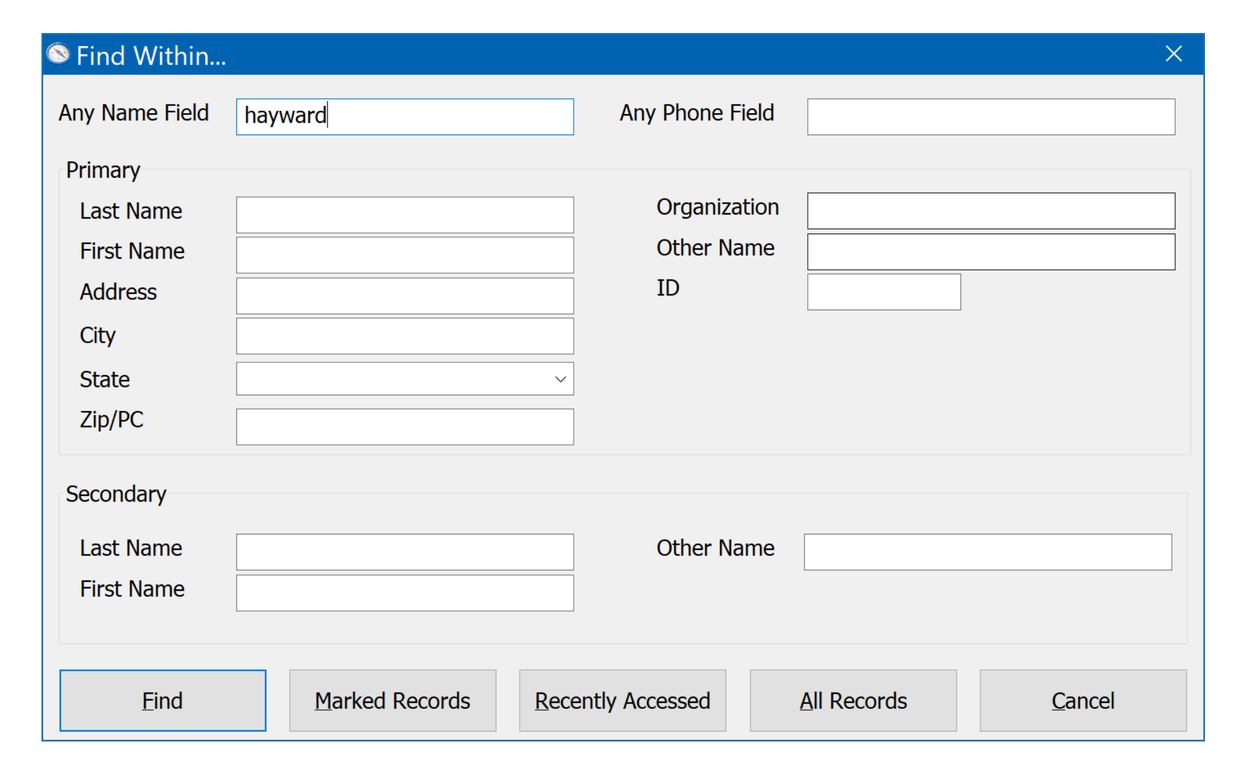
When searching for an organization, you may search by entering the organization's name in the organization search blank. With DonorQuest, you may also search by entering just a few key words from a company name. For example, instead of typing an entire company name such as, "The Corporation For Public Broadcasting", you could also enter, "public broadcasting", or "corporation for pub", or "for public br" and still find the donor record (do not use quotation marks). This has many advantages over other software systems that fail to find donors just because you leave off the first few words of a company name. Most importantly, it reduces the risk of adding duplicate donor accounts. Also, it allows you to ignore words like "the" and "a" which may or may not have been consistently entered by other people when initially adding a donor record. Note that the Flex Find method of searching (described further below) is very similar in capability but greatly simplified because it decides which fields to search based on what you type, and it does not require opening a separate search dialog.

Searching By Any Name Field

If you are unsure which field a name may have been entered in, you may use the Any Name Field feature of the find window. When searching this way, DonorQuest will find the donor account as long as the words you type occur in at least one of the name fields (last

name, first name, second name, organization name, or other name).

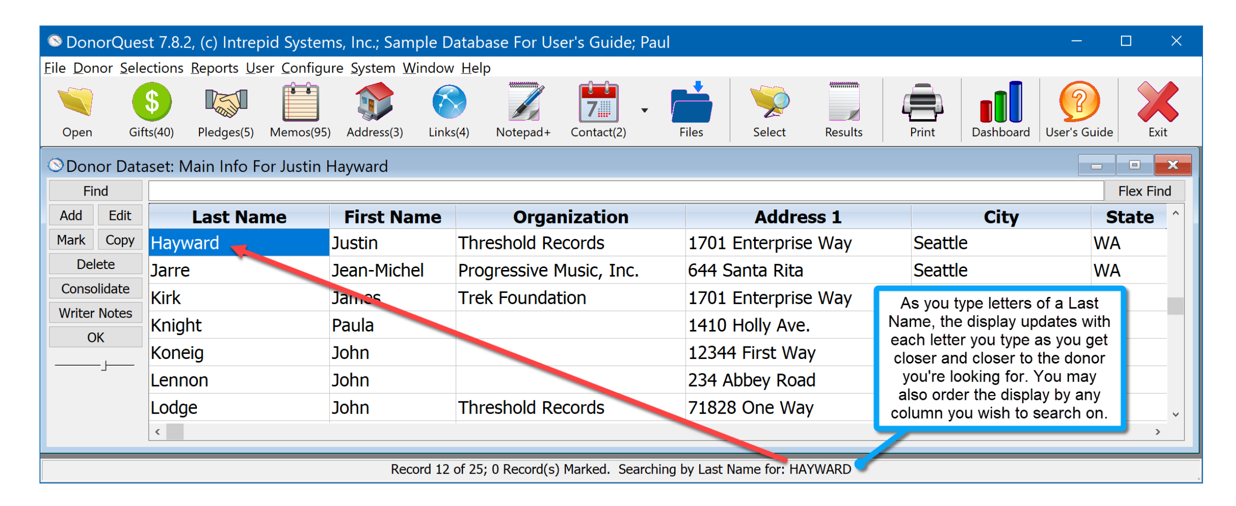
As an example of how this is useful, let's say we are searching for a person with a last name of Hayward, but we are unsure whether the person is the primary name on the account. If the person is the primary donor, then their name will be in the first and last name fields. However, if they are the domestic partner of a primary donor, then their name may be in the second name field, or possibly even the other name field. The following search would find the proper record in any case:



Most people find the All Name Fields search to be the most convenient, and elect to use it for all name searches using the basic find (yet Flex Find is even better - see below). You may even enter the full name Justin Hayward in the All Name Field and DonorQuest will find the proper record even though the two words may be split between the first and last name fields in the actual donor record. Additionally, you may use the All Name Fields to search by the primary or secondary email address for a donor record, and you need only enter enough of the email address to make the search key fairly unique in order to narrow down the results. For example, if searching for elonmusk@teslamotors.com, you could get by with simply typing elonm.

Incremental Search

In addition to the Find button as described above, you can also find donor records using the Incremental Search method. This method allows you to simply start typing the donor's name to locate the actual record. The status window at the bottom of the main DonorQuest window will change to read "Searching by Last Name for:" and it will show letters as you type and get progressively closer to the record you are searching for. Here is an example of searching for a last name of "Hayward" using the incremental search:



If you are doing an incremental search for a common last name like Smith, you can start typing the letters of the first name after you have typed the last letter of the last name. If you would like to search a different column, such as Organization Name, first click on the title for the column you want to search to order the data by that column. That also tells DonorQuest you want the incremental search to work on that column until you order by a different column.

There are two special keys when doing an incremental search. The Backspace key will remove the last letter and go backwards in the search, and the holding down the Shift key and pressing the Backspace (Shift-Backspace) will clear all the search letters you have typed so far.

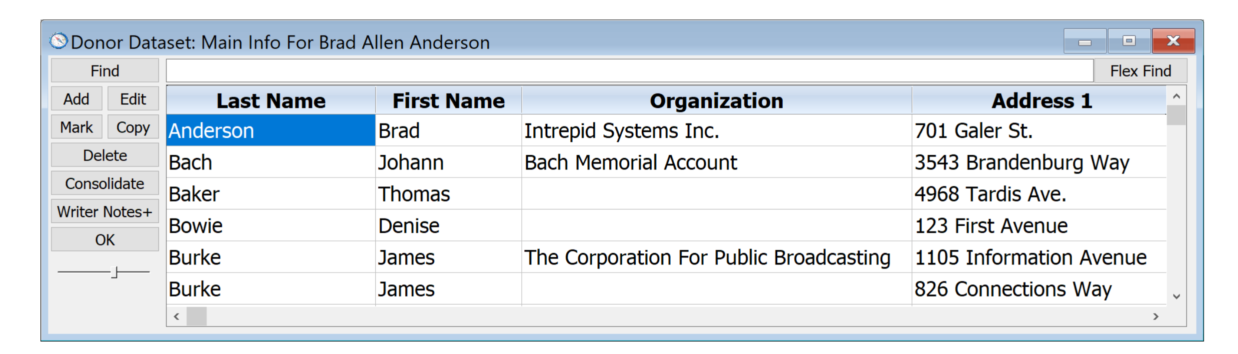
Flex Find

The Flex Find search is the one you will probably use most often for getting quick access to existing donor account information for the purposes of updating name/ address information, adding new donations, etc. While the above methods of searching all work well, they are most appropriate to use when you generally need to target specific fields. However, for easy "Google-like" searching, the DonorQuest Flex-Find simply blows other methods of searching out of the water. Flex Find is an amazing way to search for constituent records in the Main Information window without even having to think about which fields the data may be in. It is a bit like the, "Any Name Field" option of the regular Find, but it simultaneously searches across many fields (not just the name fields), and it is far more flexible in how it does it. It even searches the Extra Address table for matching names, addresses, and email addresses, so any alternate address information you may have for a constituent (such as a Summer address or even an archived historical address) is automatically considered, all in a single search! You can also enter partial names in any order (including partial words of an organization name), and combine bits and pieces of multiple fields in a single search. For example, if you are looking for, "The ABC Foundation For Exceptional Generosity", with an address of "1234 Main Street", and a main contact person of, "Elon Musk", all of the following search keys would work:

ABC 123
Gen Excep

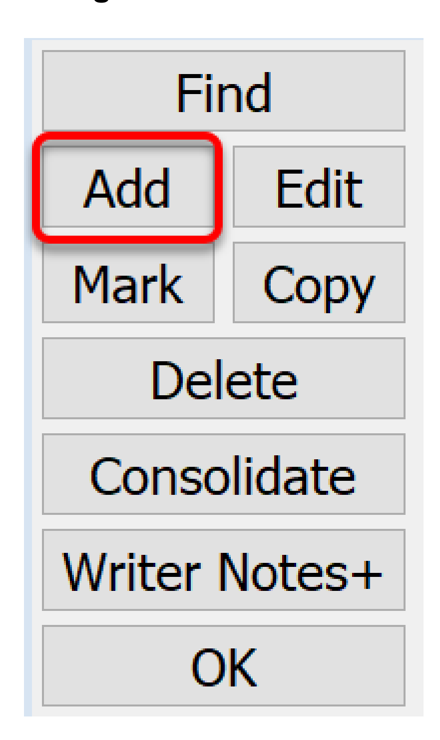
Foun ABC
Elon Foun

The Flex Find search field is always available at the top of the Main Information window, as shown here:



You may enter a search term in the Flex Find blank and click the Flex Find button to begin a search, or just press the Return key on your keyboard. You may also use the Tab and Shift-Tab key combinations to move between the Flex Find entry blank and the columns of the Main Information data grid. To display all constituent names, leave the Flex Find search field blank and press Return.

6.2 Adding New Donor Records



The Add button of the main information datasheet window will open the Main Information Form and allow you to enter the biographical information for a new donor account. All DonorQuest datasheet windows contain Add buttons, and their function is very similar -

basically, they serve to add another record to the table corresponding to the datasheet (donors, donations, pledges, etc.) For example, the donations datasheet contains an Add button which serves to add a new donation for the current donor account.

If the Main Information Form is already open either because you were editing an existing donor record, or because you just finished adding a new donor and clicked Save instead of Ok (allowing the form to stay open for additional action), you may also click on the Add button it contains to add a new donor:



When you click the Add button of the main information datasheet, the Main Donor Information Form will open, allowing you to enter the main information for the new donor. At this point you will fill in the needed values for the new donor, and click the OK button to add the new donor, or you may click the Cancel button to cancel adding of a new donor account.

If you wish, you may set default values for each of the main information fields. Default values can save you time since they allow DonorQuest to automatically enter commonly used values for your organization (such as donor type or area code) during the adding of a new donor. See Donor Default Field Values to learn more. During the actual adding of a new donor account, you may override any default field values by simply typing over them.

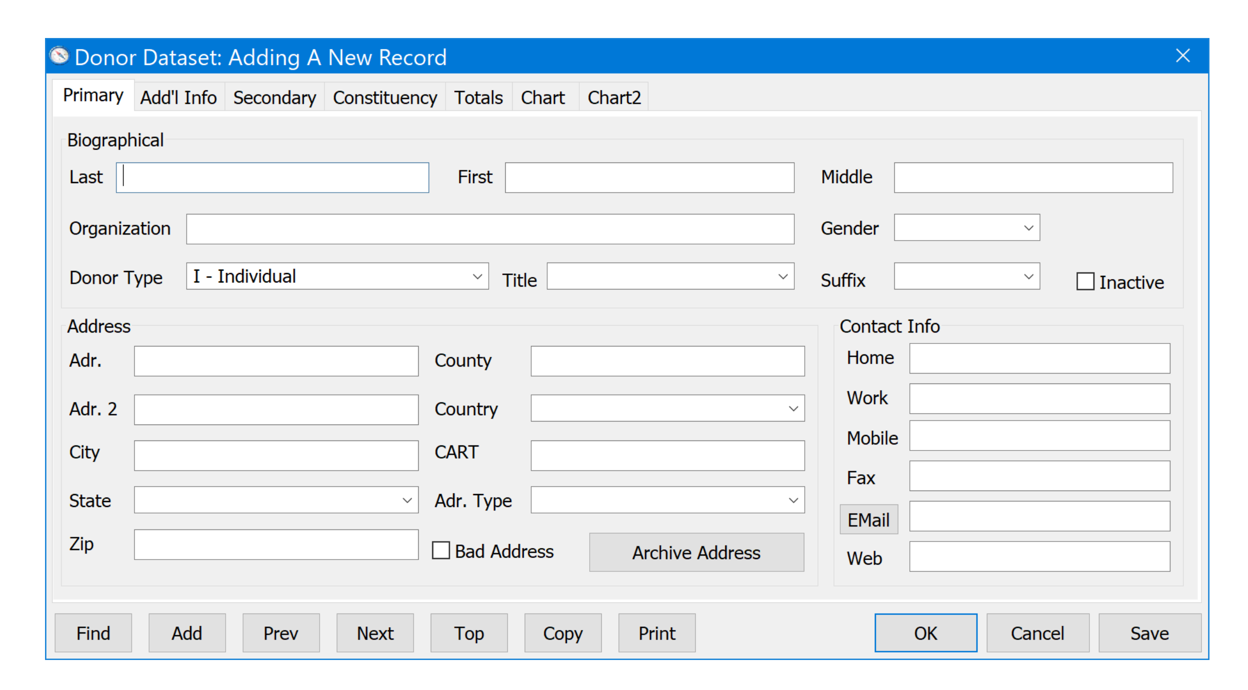
Some of the fields in DonorQuest are coded fields - they store a short, concise code that represents a longer description. For example, you would normally enter the letter "I" in the donor type field for individual donors. Using coded fields has many benefits, chief among them is that they allow for fast and consistent data entry, and they greatly reduce the chance of data entry errors since DonorQuest checks a code each time it is entered to ensure it is a valid code.

Each code field in DonorQuest has an associated code table. The codes for each code table are customized for your organization, and you are free to alter and expand these code tables at any time (please refer to the topic on Setting Up Coded Fields more information on this). Deciding how to use the coded fields available in DonorQuest is very important for effective use of the program. If you ever need help entering a code, simply click on the drop-down Codes button located to the right of each coded field.

The main biographical information for each donor is spread across various tabs: the Primary tab, Add'l Info, Secondary, Constituency, and any User-Defined field tabs:

The Primary Tab

The primary tab holds the address and contact information for the donor. DonorQuest supports automatic entry of city, state, and county based on zip code. To use this feature, leave the city, state, and county fields blank, enter the zip code, then press the Tab key on your keyboard. DonorQuest will notice that you left the city, state, and county fields blank and it will use the zip code you entered to fill in the city, state, and county for you automatically.



The following is a description of the fields available on the Primary tab:

Last Name

When the donor is an organization, the last name stores the last name of the primary contact person for the organization. For individual donors, the last name field is simply the last name of the individual donor.

First Name

When the donor is an organization, the first name stores the first name of the primary contact person for the organization. For individual donors, the first name field is simply the first name of the individual donor.

Middle Name

When the donor is an organization, the middle name stores the middle name or initial of the primary contact person for the organization. For individual donors, the middle name field is simply the middle name or initial of the individual donor.

Organization Name

The organization name field should be used to store the business names (such as, "IBM" or "Microsoft") of corporate or organizational donors. For individual donors, the organization field is generally left blank unless the donor wishes to receive mail at their place of business. For that scenario, you would still know a donor is an individual giver even if their account has an organization name because you would set the Donor Type field (shown below) to "I" to indicate they are an individual donor.

Gender

This is the gender of the individual or primary contact.

Donor Type
This is a ten character coded field used to classify donor and prospect accounts as corporations, individuals, foundations, organizations, or any other entities you wish to record. Examples:

C	Corporation
F	Foundation
I	Individual
O	Organization

Title
Donor's official title or job title. This is a coded field of ten characters.

Suffix
A ten character coded field storing the donor’s name suffix, if any. Some examples are: III, PhD, Senior, Junior. Since this is a coded field, you would make up codes for each of the suffixes you use. From this example, the codes might be: III, PHD, SENR, JUNR, with the code descriptions holding the conventional long-form spellings.

Inactive
Use this check box to denote that a record is now inactive. If it remains unchecked it is assumed that the record is still active. You can exclude all inactive records in any selection result, which is helpful when doing mailings.

Address #2
Below "Address 1" in the main information form is a place to enter a second address line, typically used for apartment or suite designations. DonorQuest actually can support a third, fourth, and fifth address line for each donor when needed for special cases such as foreign addresses. The additional address lines are actually entered as memos, with memo codes of ADDR3, ADDR4, and ADDR5 (see the topic on Memos for how to enter memos such as these for a given donor).

Country
This field can be used to augment the donor address if the donor is not living in the United States. This is a ten character coded field.

Carrier Route (cart)
DonorQuest supports the inclusion of a carrier route code in the donor's address. The carrier route is a four character code which is printed in the upper right corner of each mailing label. This code helps the Post Office process your bulk mail more efficiently, and can result in significant discounts on what you may be currently paying for your bulk mailings. The Carrier Route is not something you would normally enter manually. It is put in place when you run database cleansing procedures such as CASS Certification.

Address Type
This field is used to denote the type of address. Example are: Home, Work, Main Office,

etc. This is a ten character coded field, and each code is defined by you. You might enter a code of "Main" and define the code as "Main Office" for example.

Work Phone

This field can be used to store a donor's work telephone number. There is space provided for an extension number.

Home Phone

Basic home phone number. Additional phone numbers (beyond the home, work, fax and mobile phones) may be added via the DonorQuest memo window.

Mobile Phone

This field can store a cell phone number for the primary individual.

Fax Phone

Fax phone for donor (for those few who still use faxes).

Email

Email address for the primary donor or contact. There is also an email address for the secondary donor, and an unlimited number of email addresses may be stored for each donor account via the Extra Address table, all of which are searchable via the Flex Find feature.

Web

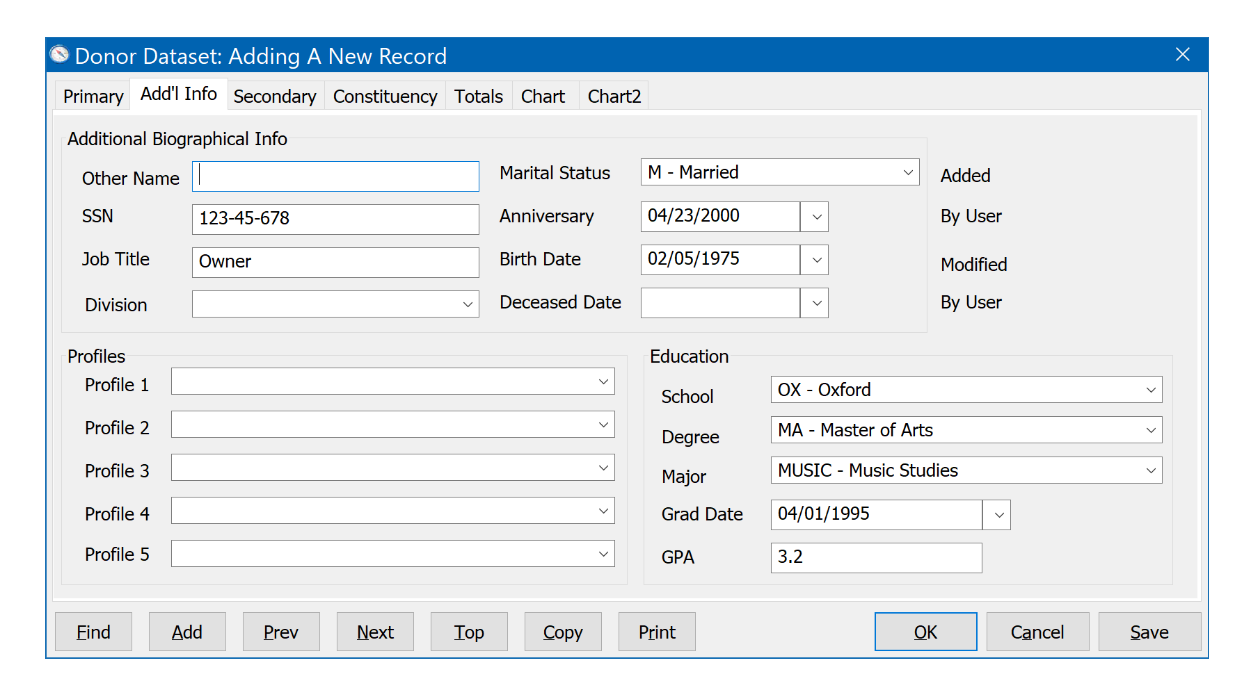
This field is used to store the Web address for either the organization or individual. For example, https://www.donorquest.com

Archive Address Button

The Archive Address button is used to make an archival copy of the main address. You may wish to do this if you are about to update the main address, yet still wish there to be a searchable record of the previous address. The copy is saved as an Extra Address, which each constituent may have an unlimited number of. This provides an easy way to keep track of all previous addresses for each constituent if you wish to do so. Extra Addresses are included in the Flex Find search feature, so using that you would still be able to find a donor searching on a past address they had.

The Add'l Info (Additional Information) Tab

The Add'l tab provides additional data entry fields allowing you to keep more useful information on your donors as shown below. Again, some of the fields are coded fields and can be defined by you. Simply click the drop-down on any coded field to see what codes already exist. You may also view when a donor was added or modified and by whom, all of which is automatically updated for you by DonorQuest. An example is shown below followed by a description of each field.



The following is a description of the fields available on the Additional Information tab:

Other Name

The other name field can be used to store nicknames, AKA's, or maiden names for individuals. It is really a general purpose search field, and can be used to store any sort of alternate or additional name with which the donor may be identified.

SSN

This field is used to store the social security number of the primary giver.

Job Title

You may use this field to store the job title or occupation of the primary giver.

Division Code

Division code field. Division codes provide a place to break your donor accounts into more detailed groups. This may be especially helpful during a capital campaign. Reports can be printed which show giving in each division. This is a ten character coded field.

Marital Status

This is a single character coded field used to track the marital status of the primary individual. Examples would be S - Single, M - Married, etc.

Anniversary

The date of the Anniversary for the primary contact and their spouse.

Birth Date

The primary donor's birth date.

Deceased Date

The date that the primary donor became deceased. Normally when a primary giver becomes deceased and they are survived by a spouse or partner, you will want to move the partner's name and other contact information to the primary fields. The Salutation1 field should also be adjusted accordingly, as that is what the surviving partner will see on correspondence. The deceased partner's information could be saved in a DonorQuest memo just to have for reference. In the case of no surviving partner, leave the donor record as is, but enter the deceased date and also check the Inactive and Do Not Solicit boxes.

Profile Codes 1...5

Used to store donor profile codes -- information about clubs, boards, memberships, special interests, occupations, alumni information, etc. Up to five profile codes may be stored. All five profile code fields share the same code table. Each profile code may be up to ten characters long.

School

What college the donor attended. This is a ten character coded field.

Degree

What degree the donor holds. This is a ten character coded field.

Major

The primary individual's major or concentration. Examples include: Business Administration, Computer Science, Psychology, etc.

Grad. Date

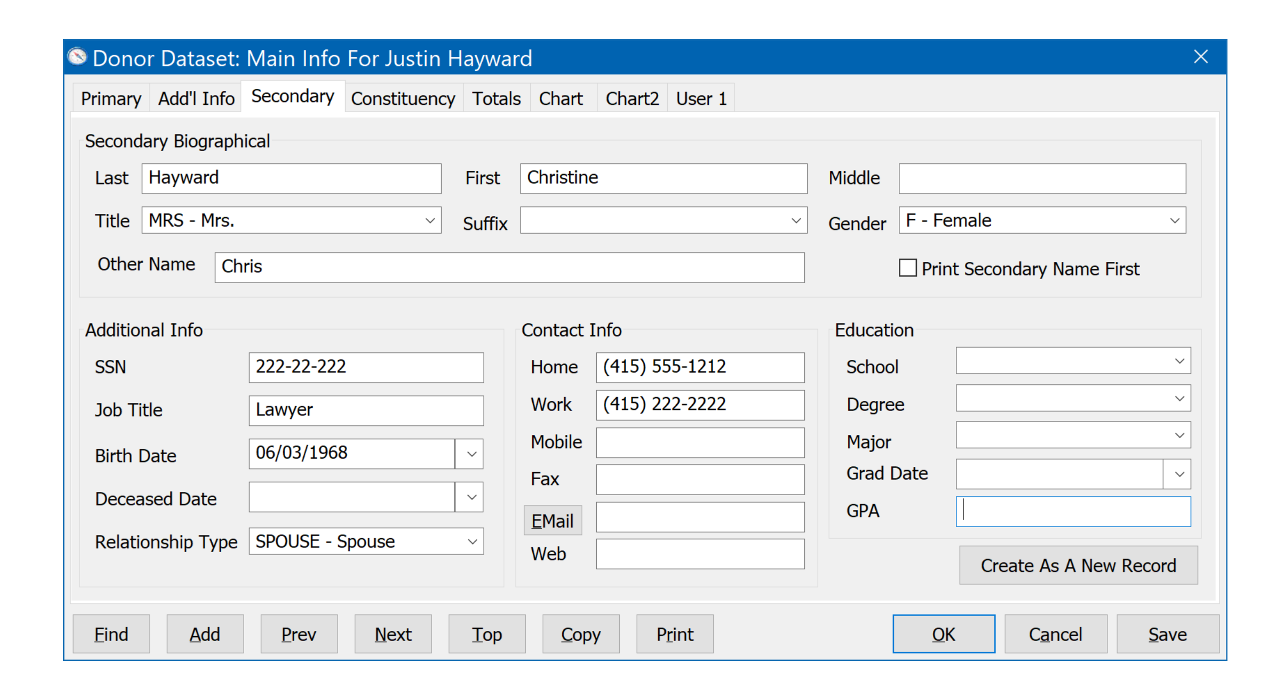
Date the donor graduated.

GPA

The donor's Grade Point Average (GPA) while attending college.

The Secondary Tab

The secondary tab is designed to keep personal information about a spouse or partner of the primary giver when they wish to have a joint giving history. Most of the fields that appear on this tab are the same as the Primary tab, and were just described above. An example is shown below followed by a description of any fields that do not appear on the Primary tab.



Print Secondary Name First

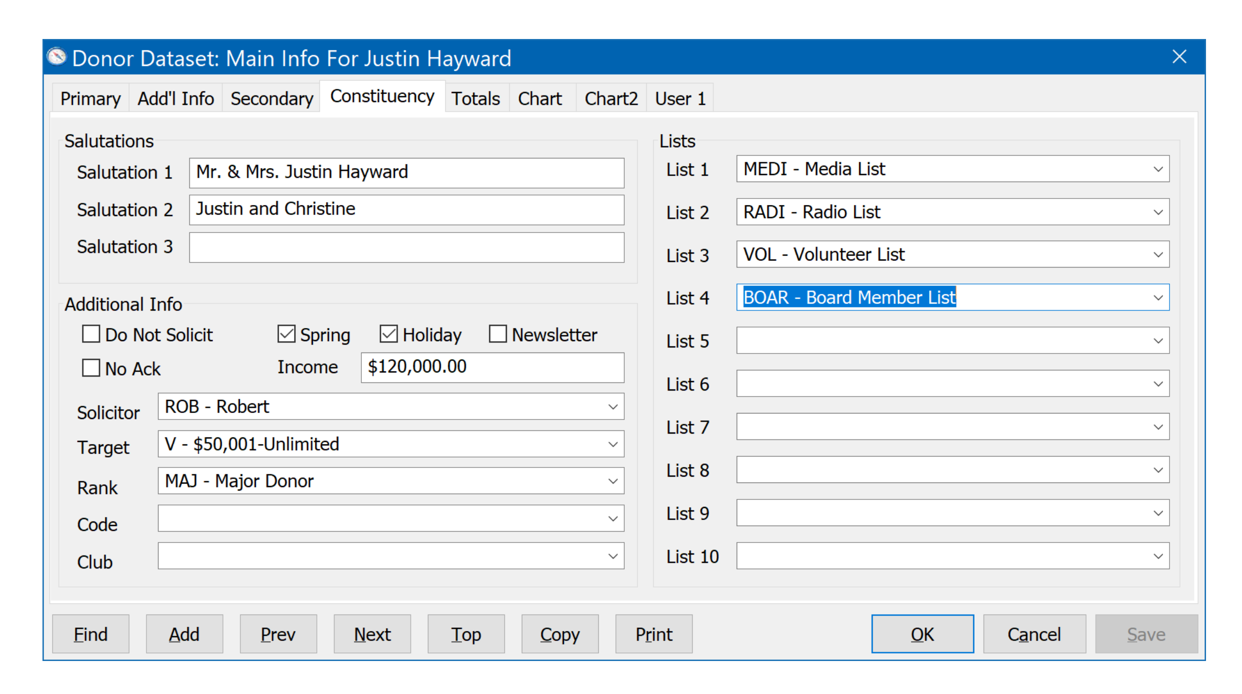
When turned on this field can be used to print the Secondary Name before printing the Primary Name on some specialized mailing labels and reports. For most mailing labels however, the Salutation 1 field of the Constituency tab is used for the first line of the label, and the actual primary and secondary first and last name fields are only for internal use and searching.

Create As New Record Button

This button can be used to create a new record for the Secondary individual. What this button will do is copy all of the information that you have entered on the Secondary tab, add a new donor, and paste all that information onto the Primary tab of the new record in the appropriate fields. This is convenient if couples separate, or decide they wish to have separate giving histories.

The Constituency Tab

The Constituency tab is used to track and manage your fundraising related interactions with the donor, including affiliating them with certain lists so that they may be easily selected for specific mailings or other contacts.



Salutation 1

The primary purpose of the salutation fields are for reports and/or exporting to a mail merge. They are what the donor sees on correspondence from your organization, so you should format them exactly as the donor wishes to be addressed. The first salutation field should be used for the formal salutation as you would want it to print on the first line of an envelope or above the address information in a thank you letter. This is a very important field, since it allows a couple to be addressed very precisely. While custom mailing labels could be designed in DonorQuest which pull directly from the primary and secondary name fields along with the title and suffix fields, doing so is very difficult to get right by formula -- especially for a couple which may be very particular in how they wish to be addressed on correspondence. Experience has shown it is far easier to have a simple fill-in-the-blank field (Salutation 1) to hold exactly how a donor want's to see their name. If you leave Salutation 1 blank, DonorQuest will try and fill it in for you when you click the Save button, piecing together the primary and secondary names along with any titles and suffixes. You may then manually edit the Salutation 1 for a given donor to make it just right, then click Save again. DonorQuest will never change the Salutation fields when there is something already in them -- only when it finds them to be empty during a record save.

Salutation 2

The Salutation 2 field may be used for an informal salutation, such as in the "Dear" block in a form letter. For example you could have Justin & Christine’s record exported for your mail merge thank you letter to read as "Justin and Christine", then in your actual form letter you would have "Dear <Salutation2>", and <Salutation2> would translate to "Justine and Christine" when you do the actual merge in Word.

Salutation 3

This is an additional salutation field that can be used as needed.

Do Not Solicit

This check box allows you to denote if a donor would rather not be solicited. You may exclude these donors when creating selections for your solicitation mailings.

Spring and Holiday

Many organizations have large mailings in both the Spring and around the holidays. These two checkbox fields let you easily include or exclude donors from these mailings.

Newsletter

Some organizations have newsletter mailings which are not intended as solicitations, but rather just to keep donor's up-to-date on what is going on. Some donors who do not want to be solicited may still be open to receiving informational mailings, so this checkbox should be left on for them.

Solicitor

This is a ten character coded field used to designate a single individual within your organization who is the main contact person for the donor or prospect. Note that if you have more complex needs, such as multiple solicitors per donor, you should consider using the DonorQuest Linkages feature for tracking your solicitor/donor relationships instead of this field.

Income

Enter the income for the donor if known. This value will usually be the annual salary for the individual. It is typically automatically populated when you augment your database with a wealth screening service, though you may also enter it by hand.

Target

This is a four character coded field that can be used to set certain target giving levels. You would enter the level of giving that you'd like to try to get the donor to give.

Rank, Code, Club

These are generic ten-character coded fields which you can adapt to your own needs. As with all code fields in DonorQuest, you are able to customize the codes to suit your organization's needs.

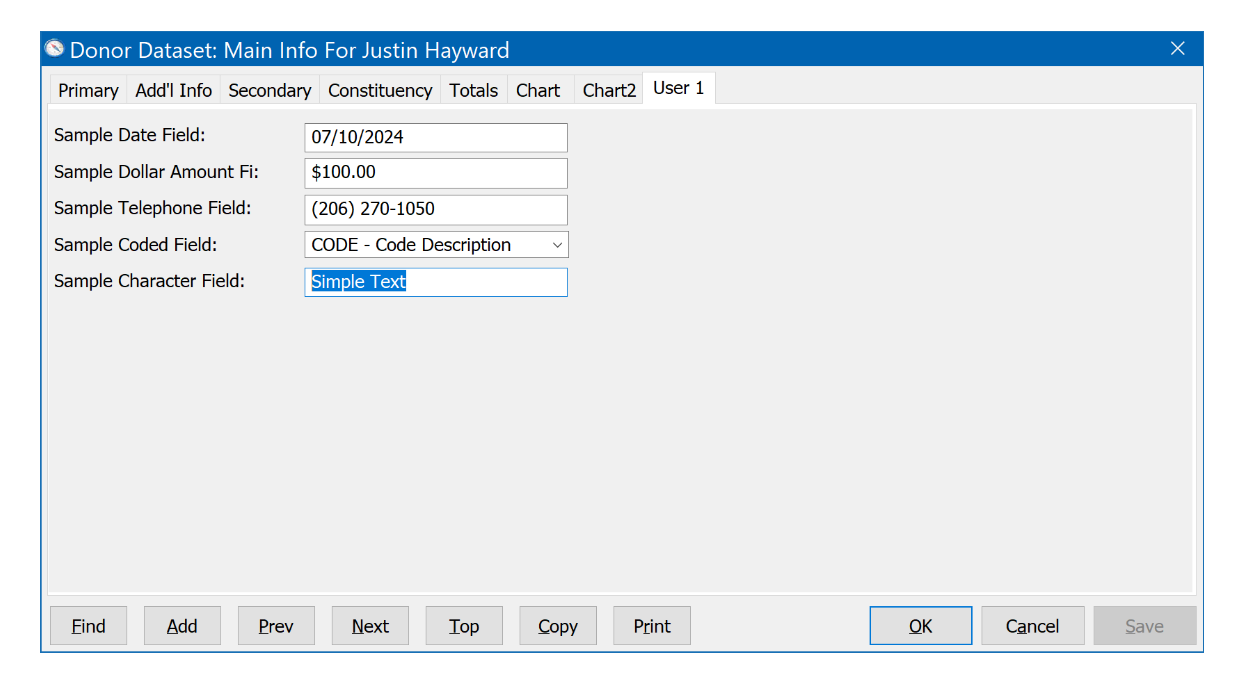
List Codes 1...10

List codes are used to store donor source code, tag, or group affiliation information. List codes are basically used to tag a donor in some way or other. For example, you may use the list codes to specify the list from which you got the donor's name. Establishing list codes makes it very easy to select subgroups of donors for specialized mailings. Up to ten list codes may be stored for each donor. All ten list code fields share the same code table. Each list code field will support a code up to ten characters long. Examples:

BOAR	Board List
MEDI	Media List
RADI	Radio List
VOLS	Volunteer List
UWAY	United Way Donor List

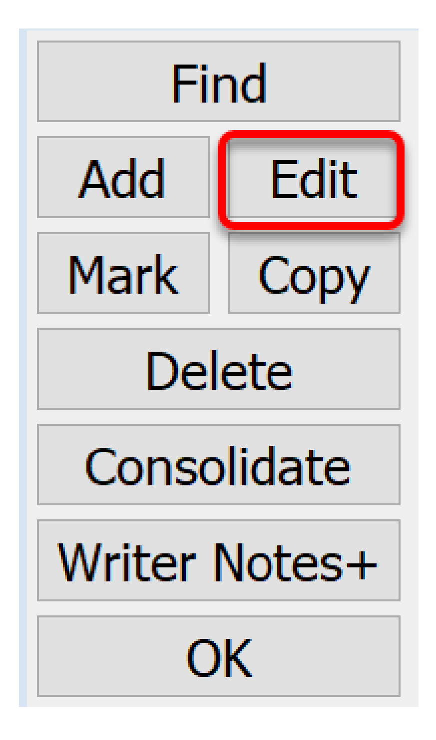
User-Defined Field Tab(s)

If you create user-defined fields in DonorQuest (via the Configure, Setup User-Defined Fields feature), you will notice that additional tabs are created to "house" the fields. Each tab can hold up to 22 fields. Fields are arranged on these new tabs in the order in which they are created. An example of what this tab would look like with some sample User-Defined fields added to the system is shown below:



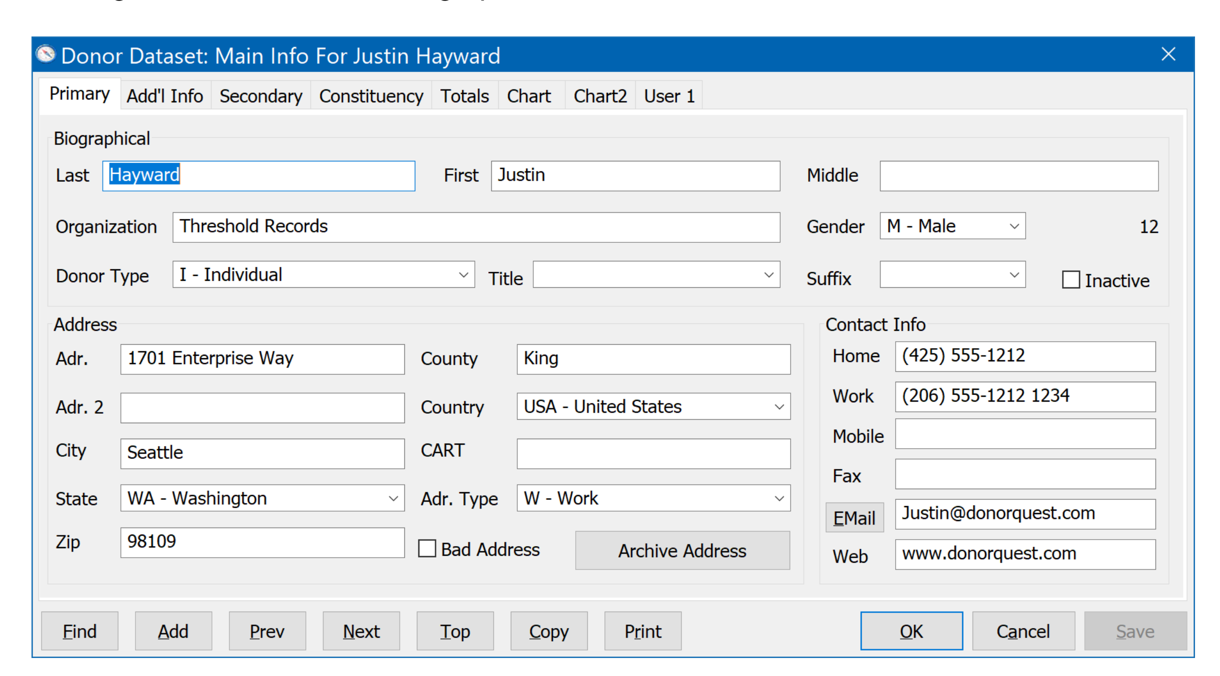
For a complete discussion of all the data fields of the Header table, please refer to the Header Table topic.

6.3 Editing Donor Information



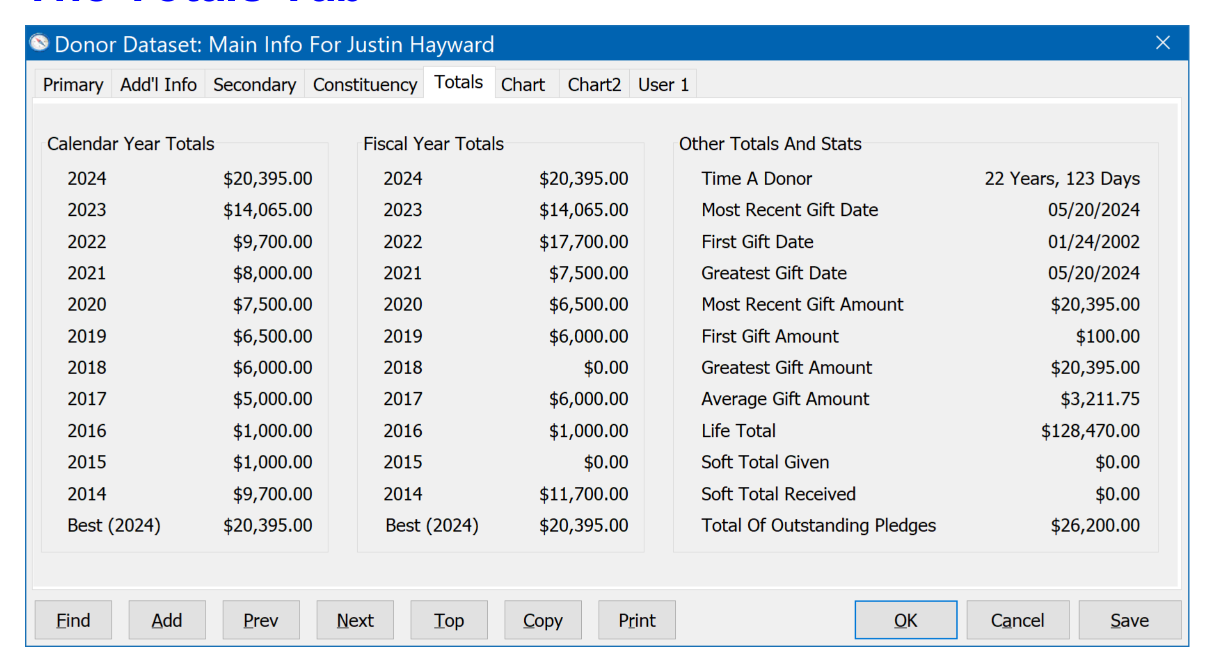
The Edit Button

If you wish to edit the biographical information for an existing donor account, simply click the Edit button of the Main Information datasheet window, shown above. This will open the Main Information Edit form as shown below, allowing you to make direct changes to an existing donor's contact and biographical information:



Most of the fields of the main donor information form have been discussed in the previous Adding New Donor Records topic. However, the Totals, Chart, and Chart2 tabs not previously discussed display some additional information maintained automatically by DonorQuest. Following is a sample display and description of each:

The Totals Tab

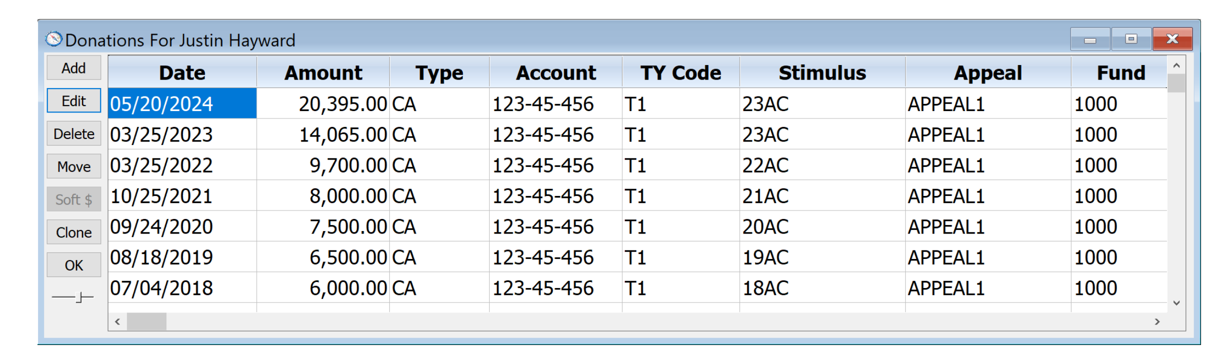


Calendar And Fiscal Year Totals

The cumulative giving totals for the current and past ten years. Calendar and Fiscal Year Totals are shown separately. The Fiscal year totals are determined based on the Fiscal Year Settings you have set for your organization under Configure, Program Settings. While DonorQuest allows alternate unit donations (such as hours of time, pounds of food, etc.), all dates and amounts shown on the Totals tab are for monetary gifts only.

Best Calendar And Fiscal Years

While ten years is a lot of ground to cover, some of your most loyal donors may have history going even further back. Because of this, the Totals tab will show the calendar and fiscal years (plus totals) in which a given donor gave the most. In the above example, we see that Justin Hayward has given consistently over the past ten years, but his most generous calendar year of giving was back in 2003 when he gave a cumulative total of $12,000. You can easily open the Donations window if you would like to see the donation detail going back that far. It's interesting to note that his best Fiscal year of giving happens to be 2017 in which he gave a cumulative total of $17,700. If we open the Donations window, we can see why:



Since we have our fiscal year starting month set to July 1st in the DonorQuest program settings (which you can access by clicking on Configure, Program Settings), the two gifts Justin had on 10/26/2016 and 03/26/2017 fell into fiscal year 2017 and got added together for that fiscal year's total, even though the donations were in separate calendar years.

Time A Donor

This is the amount of time in years and days since the donor's very first monetary gift ever.

Most Recent Gift Date

This is simply the date of the most recent monetary gift on file for the donor.

First Gift Date

This is simply the date of the very first monetary gift the donor ever gave. It is the difference between this date and the donor's most recent gift date which is used to calculate how long he has been a donor.

Greatest Gift Date

The date of the donor's greatest monetary gift.

Most Recent Gift Amount

The amount of the donor's most recent monetary donation.

First Gift Amount

The amount of the donor's first monetary donation.

Greatest Gift Amount

The amount of the largest monetary gift in the donor's entire history.

Average Gift Amount

The average of all the donor's monetary gifts.

Lifetime Total

The total of all monetary gifts in the donor's history, for all time.

Soft Total Given

The total of all hard monetary gifts the donor has given, which were then also given as soft gifts to other donors, adding to their Soft Credits Received total.

Soft Total Received

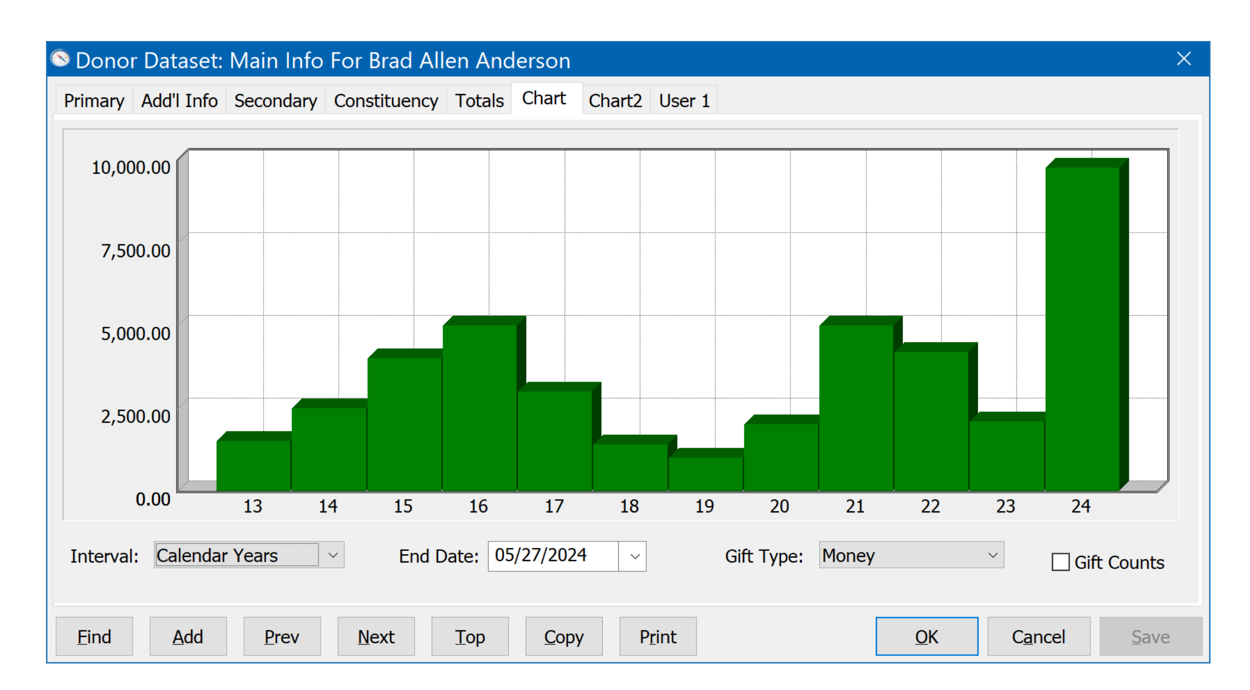
The total of all soft credit donations assigned to the donor from the hard giving of other donors. Please see the topic on the Donations Table for more information about soft credit donations.

Total Of Outstanding Pledges

The total balance remaining to be paid across all active pledges for the donor.

The Chart Tab

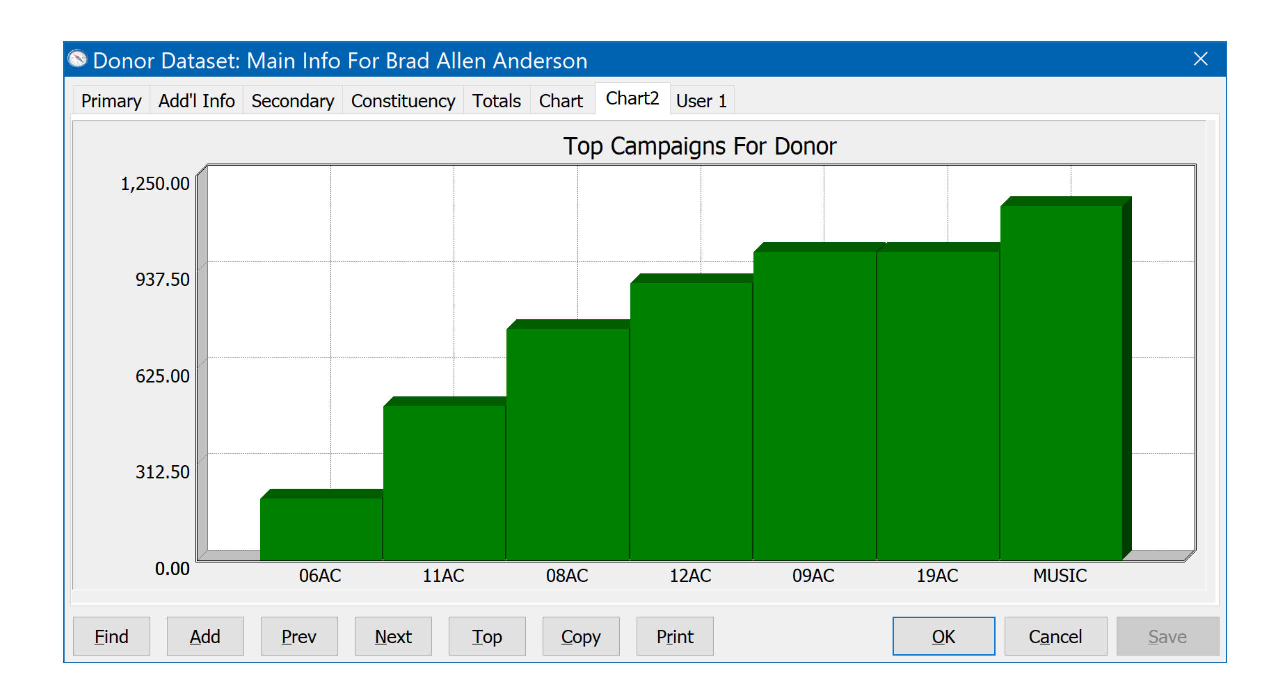
The two chart tabs show a graphical representation of the donor's giving history. The first chart tab shows a bar graph of the annual cumulative total each year for the current and past eleven years for each donor so that you may easily see at a glance the donor's giving level on a year-by-year basis. This tab also allows you to change the Interval from calendar years to fiscal years, or even to months and weeks. Simply click on the Interval drop-down to see different time intervals. Also, you may choose the End Date of the graph -- it can be today (the default), or any time in the past. You may also choose the type of donations which are included. By default, only monetary donations are considered. But you may also look at one of the two Alternate Unit types of donations you defined for your organization under Program Settings, such as hours of time or pounds of food. Finally, you may graph the total number of gifts as opposed to the total of gift amounts by turning on or off the Gift Counts checkbox. Here is the default view for the first chart tab:



Note that you may also graph any donation-based Selection Result by highlighting the result you wish to graph in the Selection Results window, then clicking on Selections, Donation Graphs From. Such a selection could filter the donations shown for a specific donor by any condition you could think of (showing just specific campaigns or donations over a certain amount, for example), and it can also combine the giving of multiple donors into a single graph.

The Chart2 Tab

The second chart tab shows a pie chart with the ten stimulus codes (campaigns) the donor has given the most to:



6.4 Header Table



The Header table houses all of the biographical fields shown on the Main Information Datasheet and Form views. Most of these fields can be edited in the various tabs of the Main Information Form, but some (such as donation totals) are maintained automatically by DonorQuest. DonorQuest is a relational database and maintains donor data across seven tables. The Header table is the master or "parent" table. It maintains a one-to-many relationship with the other six tables. The other tables (Donations, Pledges, Memos, Extra Addresses, Linkages, and Scheduled Contacts) are referred to as "child" tables because they can not contain records which exist without a corresponding record in the Header table. For example, you could have a header record for a person or company who is not yet a donor, and who has no related records in the Donations table, but you could not have a donation record with no corresponding name for it to belong to in the Header table. All of the tables are connected to each other through the unique donor ID which each donor account is automatically assigned by DonorQuest when the donor account is first created. In most cases you do not need to be aware of the relationships between data tables in DonorQuest since everything is managed automatically. The times you do need to be aware are when you wish to target specific donation records for a report or export. For example, if you only want donations for a specific period of time to be included on a report, you would use a donation-based report rather than a Header-based report.

Following is a description of the header fields in DonorQuest. This list includes some fields automatically maintained by DonorQuest for reporting purposes and shown in the Main Information datasheet view, but not shown in the form. The fields are presented in the

order in which they appear by default on the field menu in DonorQuest, which also corresponds to the order the fields occur in on the Main Information form:

Last Name

When the donor is an organization, the last name stores the last name of the primary contact person for the organization. For individual donors, the last name field is simply the last name of the individual donor.

First Name

When the donor is an organization, the first name stores the first name of the primary contact person for the organization. For individual donors, the first name field is simply the first name of the individual donor.

Middle Name

When the donor is an organization, the middle name stores the middle name or initial of the primary contact person for the organization. For individual donors, the middle name field is simply the middle name or initial of the individual donor.

Organization Name

The organization name field should be used to store the business names (such as "IBM" or "Microsoft") of corporate or organizational donors. For individual donors, the organization field is generally left blank unless the donor wishes to receive mail at their place of work. In that case, the Donor Type field would be used to know the constituent is an individual donor, even though their record has the name and address of a business.

Other Name

An "also known as", maiden, or nickname for the donor.

Salutation 1

The primary purpose of the salutation fields are for reports and/or exporting to a mail merge. They are what the donor sees on correspondence from your organization, so you should format them exactly as the donor wishes to be addressed. The first salutation field should be used for the formal salutation as you would want it to print on the first line of an envelope or above the address information in a thank you letter. This is a very important field, since it allows a couple to be addressed very precisely. While custom mailing labels could be designed in DonorQuest which pull directly from the primary and secondary name fields along with the title and suffix fields, doing so is very difficult to get right by formula -- especially for a couple which may be very particular in how they wish to be addressed on correspondence. Experience has shown it is far easier to have a simple fill-in-the-blank field (Salutation 1) to hold exactly how a donor want's to see their name. If you leave Salutation 1 blank, DonorQuest will try and fill it in for you when you click the Save button, piecing together the primary and secondary names along with any titles and suffixes. You may then manually edit the Salutation 1 for a given donor to make it just right, then click Save again. DonorQuest will never change the Salutation fields when there is something already in them -- only when it finds them to be empty during a record save.

Salutation 2

The Salutation 2 field may be used for an informal salutation, such as in the "Dear" block in a form letter. For example you could have Justin & Christine's record exported for your mail merge thank you letter to read as "Justin and Christine", then in your actual form letter you would have "Dear <Salutation2>", and <Salutation2> would translate to "Justine and Christine" when you do the actual merge in Word.

Salutation 3

This is an additional salutation field that can be used as needed.

Title

You may use this field to store the personal title or occupation of the primary individual.

Suffix

A ten character coded field storing the donor's name suffix, if any. Some examples are: III, PhD, Senior, Junior. Since this is a coded field, you would make up codes for each of the suffixes you use. From this example, the codes might be: III, PHD, SENR, JUNR, with the code descriptions holding the conventional long-form spellings.

Address

Address Line 1 for donor's main address.

Address #2

Below "Address 1" in the main information form is a place to enter a second address line, typically used for apartment or suite designations. DonorQuest actually can support a third, fourth, and fifth address line for each donor when needed for special cases such as foreign addresses. The additional address lines are actually entered as memos, with memo codes of ADDR3, ADDR4, and ADDR5 (see the topic on Memos for how to enter memos such as these for a given donor).

Print 2nd Name First

Check Box set true if spousal/partner name is to be printed first on mailing labels. Note that most labels draw on the salutation fields, and use of the salutation fields is preferred.

ID Num

Unique ID number of each donor, used to relate all tables.

City

City of Main Address.

State

State of Main Address.

Zip

Zip / postal code of Main Address..

County

County of Main Address.

Carrier Route
Carrier route of main address, used for postal discounts.

Country
County of Main Address.

Inactive
Check box set to true if donor is inactive. Actual value in table is Y for checked on, N or blank for checked off.

Bad Address
Bad Address Check box set to true if main address for donor is found to be invalid because of returned mail. It is also set as needed during an automated batch import of verified addresses by 3rd party software or service. Actual value in table is Y for checked on, N or blank for checked off.

Do Not Solicit
Check box set true if donor is not to be contacted for solicitations. Actual value in table is Y for checked on, N or blank for checked off.

Do Not Acknowledge
Check box set true if donor is not to be acknowledged with a thank-you letter for their gifts. Actual value in table is Y for checked on, N or blank for checked off.

Telephone
Home phone number for primary donor. Traditionally this is a wired land line, but since most people just use their mobile phones for everything (for which a separate field is provided), this could be simply an extra private number for the donor.

Work Phone
Work phone number for primary donor.

Fax Phone
Fax phone for primary donor.

Mobile Phone
Mobile phone for primary donor.

Email
Email address for primary donor.

Web Address
Web address used mainly for organizational donors.

Gender
Gender of primary donor.

Birthday
Birth Date of primary donor.

Deceased Date
Date of primary donor's death if deceased. Donor account should also be set to Inactive status if a date is entered here. Or, if there is a surviving spouse and the account is to remain active, the surviving partner's name should be moved to the primary name fields.

Anniversary
The Anniversary date for the primary contact and their spouse or partner stored in the secondary name fields.

Marital Status
Check box set true if primary donor is married, whether or not their spouse is shown in the secondary fields. Actual value in table is Y for checked on, N or blank for checked off.

School Attended
Last school or college attended. Ten character coded field.

Major
Degree program or area of study for primary donor.

GPA
Grade Point Average donor held at last school attended.

Degree
Degree help by donor, if any.

Graduation Date
Date of graduation from last school attended.

Job Title
Professional title of primary donor.

Primary SSN
Social Security number of primary donor.

Target Annual Revenue
Target for annual giving.

Annual Income
Annual income of single donor, or joint income of primary and secondary for a couple. It is typically automatically populated when you augment your database with a wealth

screening service, though you may also enter it by hand.

Secondary Last Name
Spouse or partner last name.

Secondary First Name
Spouse or partner first name.

Secondary Middle Name
Spouse or partner middle name.

Secondary Birth Date
Birth date of spouse or partner.

Secondary Deceased Date
Date spouse or partner became deceased.

Secondary Gender
Gender of spouse or partner.

Secondary Job Title
Spouse or partner professional title.

Secondary Other Name
Spouse or partner other name -- could be aka, nick name, maiden name, etc.

Secondary SSN
Spouse or partner Social Security Number.

Secondary Suffix
Spouse or partner suffix.

Secondary Title
Spouse or partner personal title.

Secondary Telephone
Spouse or partner main phone.

Secondary Work Phone
Spouse or partner work phone.

Secondary Fax Phone
Spouse or partner fax phone.

Secondary Mobile Phone

Spouse or partner mobile phone.

Secondary Email
Spouse or partner email address.

Secondary Web Address
Spouse or partner web address.

Notepad
You may enter free-form notes about each donor in paragraph form. The notepad feature lets you enter many paragraphs of text about each donor in a word processor-like window which does automatic paragraph formatting. The full text of all notepad entries across all donors is available for keyword searches during selections, and you can also include each donor's notepad text on any report.

List1...List10
Used to store donor source code or tag information. List codes are basically used to tag a given donor in some way or other. For example, you may use the list codes to specify the list from which you got the donor's name. Or they can be used for affiliation codes, such as what social, political, or business groups a donor may belong to. Establishing list codes makes it very easy to select subgroups of donors for specialized mailings. Up to ten list codes may be stored for each donor, each supporting a code up to ten characters long.

Profile1...Profile5
There is some overlap between the functionality of List and Profile codes, but generally profile codes are used for more personal interests or classifications, such as whether the donor has children, owns a home, etc. Up to five profile codes may be stored, each code may be up to ten characters long.

Donor Type
Type of Donor - Normally "I" for individuals, or any other coding to indicate corporations, organizations, foundations, etc. Ten character coded field.

Address Type
Type of address main address is, i.e. Home, Work. Ten character coded field.

Division
Division codes provide a place to break your donor accounts into more detailed groups. This may be especially helpful during a capital campaign. Reports can be printed which show giving in each division. Ten character coded field.

Solicitor
This is a ten character coded field used to designate a single individual within your organization who is the main contact person for the donor or prospect. Note that if you have more complex needs, such as multiple solicitors per donor, you should consider using the DonorQuest Linkages feature for tracking your solicitor/donor relationships instead of this field.

Code
Generic ten character coded field.

Rank
Generic ten character coded field.

Club
Generic ten character coded field.

Spring
Check box set true if donor is to receive Spring mailings.

Holiday
Check box set true if donor is to receive Spring mailings.

Newsletter
Check box set true if donor is to receive Newsletter mailings.

Relationship Between Primary And Secondary
Code for type of relationship between primary and secondary names. Ten character coded field.

Donations
Total number of donations for each donor.

Pledges
Total number of pledges for each donor.

Memos
Total number of memos for each donor.

Extra Addresses
Total number of Extra Addresses for each donor.

Solicitations
Total number of solicitations sent for each donor.

Linkages
Total number of linkages for each donor.

First Donation Amount
Amount of first donation given by donor.

First Donation Date

Date of first donation given by donor.

Most Recent Donation Amount

Amount of most recent donation given by donor.

Most Recent Donation Date

Date of most recent donation given by donor.

Most Recent Solicitation Date

Date most recent solicitation was sent to donor.

Most Recent Solicitation Event Code

Event code of most recent solicitation. This is usually the campaign (donation stimulus) code.

Donation Total

Lifetime total of all giving from donor.

Donation Total For Current Year

Total of all monetary donations given by donor during current calendar year.

Donation Total For Calendar Year 1 Year Ago

Total of all monetary donations given by donor during previous calendar year.

Donation Total For Calendar Year 2 Years Ago

Total of all monetary donations given by donor during calendar year, two years ago.

Donation Total For Calendar Year 3 Years Ago

Total of all monetary donations given by donor during calendar year, three years ago.

Best Calendar Year

Calendar year in which the donor had the largest total giving for all monetary donations.

Best Calendar Year Total

Total of all donations for the donor's best calendar year of giving.

Donation Total For Current Fiscal Year

Total of all monetary donations given by donor during current fiscal year.

Donation Total For Fiscal Year 1 Year Ago

Total of all monetary donations given by donor during previous fiscal year.

Donation Total For Fiscal Year 2 Years Ago

Total of all monetary donations given by donor during fiscal year, two fiscal years ago.

Donation Total For Fiscal Year 3 Years Ago
Total of all monetary donations given by donor during fiscal year, three fiscal years ago.

Best Fiscal Year
Fiscal year in which the donor had the largest total giving for all monetary donations.

Best Fiscal Year Total
Total of all donations for the donor's best fiscal year of giving.

Average Donation Amount
Average of all donor's monetary donations.

Greatest Donation
Largest single monetary donation given by donor.

Last Date Edited
Date on which last change or update of any sort was made to the donor account, including the adding of donations, pledges, etc.

Who Last Edited
User name of person who last made any change or update of any sort to the donor account, including the adding of donations, pledges, etc.

When Donor Added
Date donor account was created.

Giving Entity
This is a computed field. It's value is based on the Donor Type field. If the Donor Type field is an "I" indicating an individual donor, then Giving Entity will be the primary Last and First name fields combined and separated by a comma, like this: Smith, John. If the first character in the Donor Type field is anything other than "I", the Giving Entity will simply be the Organization Name.

Who Added Donor
User name of person who added the donor account.

6.5 Donations Table



Following is a description of the donation fields in DonorQuest. This list includes some fields automatically maintained by DonorQuest for reporting purposes, but not shown in the donation form. For some background information about donations and example use, please first read the Quick Start topic on the Gifts button.

Donation Date

This is typically the date on which a donation is entered, though you may decide to use it to store the date on which the donation was received, or the date on the donor's check. Since DonorQuest automatically tracks the entry date of the donation in the entry date field (described later), you are free to use this field to store any date you wish, and still have the entry date tracked. DonorQuest will normally accept only valid dates of the form (mm/dd/yy), however you can set the date validation to date standards for countries other than the U.S. by clicking on User, Change Your Personal Settings.

Donation Amount

This is normally the dollar amount of a donation. DonorQuest will accept 2-decimal place numbers, from 0.00 up to 9,999,999,999.99. DonorQuest can also store non-monetary donations, such as donations of time. The code stored in the Donation Type field of the donation determines whether the donation amount is interpreted as a monetary amount.

Donation Type

The donation type field is typically used to store the method of payment, such as cash, check, charge, etc. DonorQuest will accept up to 10 alphanumeric characters for this field. This is a coded field. DonorQuest is capable of storing in-kind and other non-cash gifts such as volunteer hours, pounds of food, etc. To use this feature, you would simply enter a special non-cash code for the donation type (such as HR for hours, or LB for pounds), then use the Donation Amount for the quantity -- for example, 2.25 for 2 hours and 15 minutes. The actual donation type codes for non-cash gifts can be defined by your organization under Configure, Program Settings. There two Alternate Unit codes may be established to flag Alternate Unit (non-monetary) donations. When donations are so coded, the Donation Amount is kept out of the monetary totals.

Donation Account

Typically used for accounting purposes to track deposit account codes, this field is capable of storing a cash flow account number up to twenty characters long. The actual format of the account number is up to you. The General Ledger financial reports are linked into this field. Donation subtotals are shown by account number on one of the Ledger reports. This is a coded field.

Donation Stimulus

This field specifies the stimulus for the donation -- why the donor gave. Normally the Donation Stimulus corresponds to a Campaign code, but there can be reasons other than campaigns that a donor gives so the Stimulus is technically broader in scope. This is a 15 character coded field. Here are some examples:

16AC	2016 Annual Campaign

17AC	2017 Annual Campaign
16SA	2016 Spring Appeal
17SA	2017 Spring Appeal
BRKFST	Breakfast Special Event
UNSOL	Unsolicited

Donation Fund

The Donation Fund is used to categorize gifts after they are received -- usually how the money is to be spent. Think of it as the gift designation. It may be where the gift went after it was received, or the reason the gift was requested. This is a 15 character coded field. Here are some examples:

1000	Unrestricted Fund
2000	Building Fund
3000	Scholarship Fund
4000	Emergency Room Fund
5000	Memorial Fund

Donation Appeal

DonorQuest has the ability to track each and every appeal you make for each campaign. As the donations come in, you will be able to print reports which show the percentage of return and dollar totals you are getting for each appeal, AND for each campaign (Stimulus) as a whole. These reports can be viewed and printed by selecting Reports, Donation/Pledge Statistics. From there you would open the Stimulus or Appeal tables to see statistics on returns. Giving statistics are also maintained for Donation/Pledge Type, Account, and Fund codes. The Donation Appeal is a 15 character coded field.

Donation TY Letter

The Donation Thank-You Letter Code is used to store codes referring to the various thank-you letters you may send to acknowledge a gift. When mail merge files are generated for your word processor, they are assigned file names based on the Thank-You Letter code entered for each gift. For example, if for a given batch of 100 donations, you entered 80 donations with a Thank-You Letter code of BASICTHANK, and 20 donations with a Thank-You Letter code of BIGTHANK, then two mail merge files would be automatically generated when you run the General Ledger Process. The first would be named MergeBASICTHANK.txt, and the second MergeBIGTHANK.txt. The first file would contain the name/address/donation information for the 80 BASICTHANK donations, and the second would contain the name/address/donation information for the 20 BIGTHANK donations. For information about which fields actually go into a mail merge file, please refer to the chapter on the General Ledger Process. DonorQuest will accept ten alphanumeric characters for this field.

Donation TY Value

In some cases, the donor may receive something of value in return for their generous donation, such as a coffee mug. In these cases the tax deductible amount of the donor's gift is less than the actual dollar amount of the gift itself. The TY (Thank-You) Value is used

for the value of anything in return the donor may have gotten for his gift. Normally this is nothing, so this value remains zero. This amount may also be included into DonorQuest's automated thank-you letters, allowing the donor to have a record of the actual amount he should report on his taxes. For our example donation, let's say the gift is $100 and the donor receives a coffee mug with a $10 value. You would enter $10 for the donation TY value. Then when tax receipts are printed, DonorQuest will compute the tax-deductible amount as $100 - $10 = $90.

Donation Batch Number

The Donation Batch Number allows you to group donations into batches, usually for daily deposits. For example, multiple data entry people could be working on large number of checks, all using the same batch number so that they will all be grouped together for a single bank deposit and will be automatically totalled by running the General Ledger process for the batch number. If you plan to use the same batch number for a large number of donation entries, you could set the batch number as a default under Configure, Donation Default Field Values. That way, each time you add a new donation, DonorQuest will automatically fill in the current batch number for you.

Donation Check Number

This field provides space for the check number if donation is by check. It can also be used to store the donor's credit card number for recurring donations or pledge payments.

Donation Check Date

This field provides space for the check date if donation is by check. It can also be used to store the expiration date for the donor's credit card number for recurring donations or pledge payments.

Donation Comment

Each donation also has space for an optional comment. This comment should specifically apply to the donation being entered, and not to the donor in general (general comments about the donor should go in the donor's Notepad).

Pledge To Credit

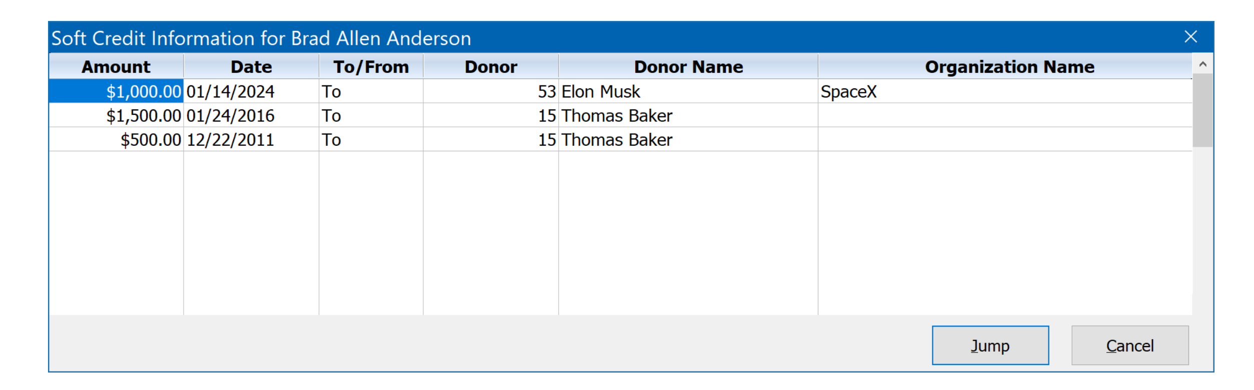
The Pledge To Credit Browse button on the donation form allows you to apply the new donation as a payment toward one of the donor's outstanding pledges. DonorQuest can be set to notify you during the entry of a gift when a donor has one or more outstanding pledges which the gift may actually be a payment towards. This automatic notification can be turned on or off for your DonorQuest account specifically under User, Change Your Personal Settings. When you apply a donation as a payment to an existing pledge, the Donation Type, Account, Stimulus, Fund, and Appeal codes will be automatically filled in for you from the pledge to which you are linking the donation as a payment. Of course this is only done for blank donation fields - any codes you may have already entered before linking the donation are kept as you entered them.

Give Soft Credit To

The Give Soft Credit To Browse button supports an advanced feature called soft credits. This feature can be used to acknowledge that another donor may have been instrumental in bringing in a gift, even though they didn't actually give it. An example would be a local radio station which might urge its listeners to give to your organization. The actual givers would have the cash gifts entered directly in their accounts, but as you enter each gift you would give soft credit to the radio station.

So simply stated, soft donation credit may be given to a donor for stimulating the giving of another donor. As another example, let's say that John Smith lobbied IBM corporation for a gift of $1,000 which IBM gave. The actual $1,000 would go into IBM's history, and a soft credit reference to the $1,000 gift would go into John Smith's history. Because the $1,000 credit in John Smith's history is soft, it is not included in his actual cash totals. However, it is on record. For specific selections and reports, you may tell DonorQuest whether or not to consider soft credits. Whenever you choose to consider soft credits during a selection or report, it will be as though John Smith had actually given $1,000, in addition to any actual hard donations he has.

If a donor has received soft credit for the actual gift(s) made by one or more other donors, a nonzero dollar total will appear to the right of, "Soft Total Received" on the receiving donor's Totals tab. This allows you to see at a glance if a donor has any soft credits when viewing the donor's main information form. This would also enable the Soft$ button on the donor's donation datasheet display. Clicking this button would show all the software credits the current donor has received from other donors, and the actual gifts he has made which have been soft credited toward other donor accounts. Here is an example of what the Soft Credit Information window looks like:



The Jump button will allow you to go to the donor account the highlighted soft credit is to or from. From there, you could jump back by viewing that donor's soft credit information window, in which you will find a reciprocal linkage.

When Added

This is the actual date the donation was entered. DonorQuest automatically fills in this field using your computer's system clock. This field is maintained by DonorQuest and can not be edited. It is for informational displays, reports, exports, and selections.

Who Added

The user name of the person who entered the donation. DonorQuest automatically fills in this field using the login name of the current user. This field is maintained by DonorQuest and can not be edited. It is for informational displays, reports, exports, and selections.

When Acknowledged

This is the date on which the General Ledger / Mail Merge acknowledgement process was run for the donation. It should correspond very closely to the actual date you sent out an acknowledgment letter for the donation. DonorQuest automatically fills in this field using your computer's system clock when you run the general ledger / mail merge process. This field is only available for reports, exports, and selections. The donation form window does not display this field, but it can be seen in the donation datasheet display.

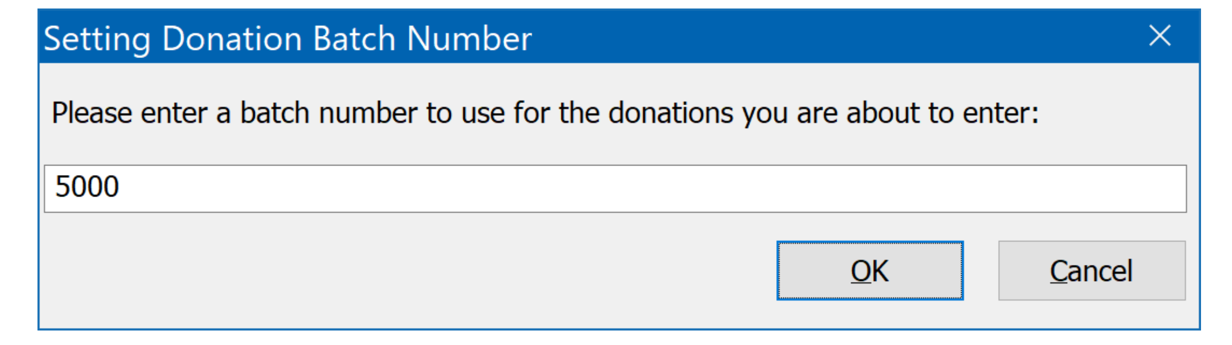
6.5.1 Batch Donation Entry

Donor, Batch Donation Entry

In addition to using the standard donation form for entering new donations, you may also use one of the two batch entry forms. These forms are designed for rapid entry of donations, and feature a single window which has all of the essentials needed to lookup donors by multiple search fields and add gifts in one integrated form.

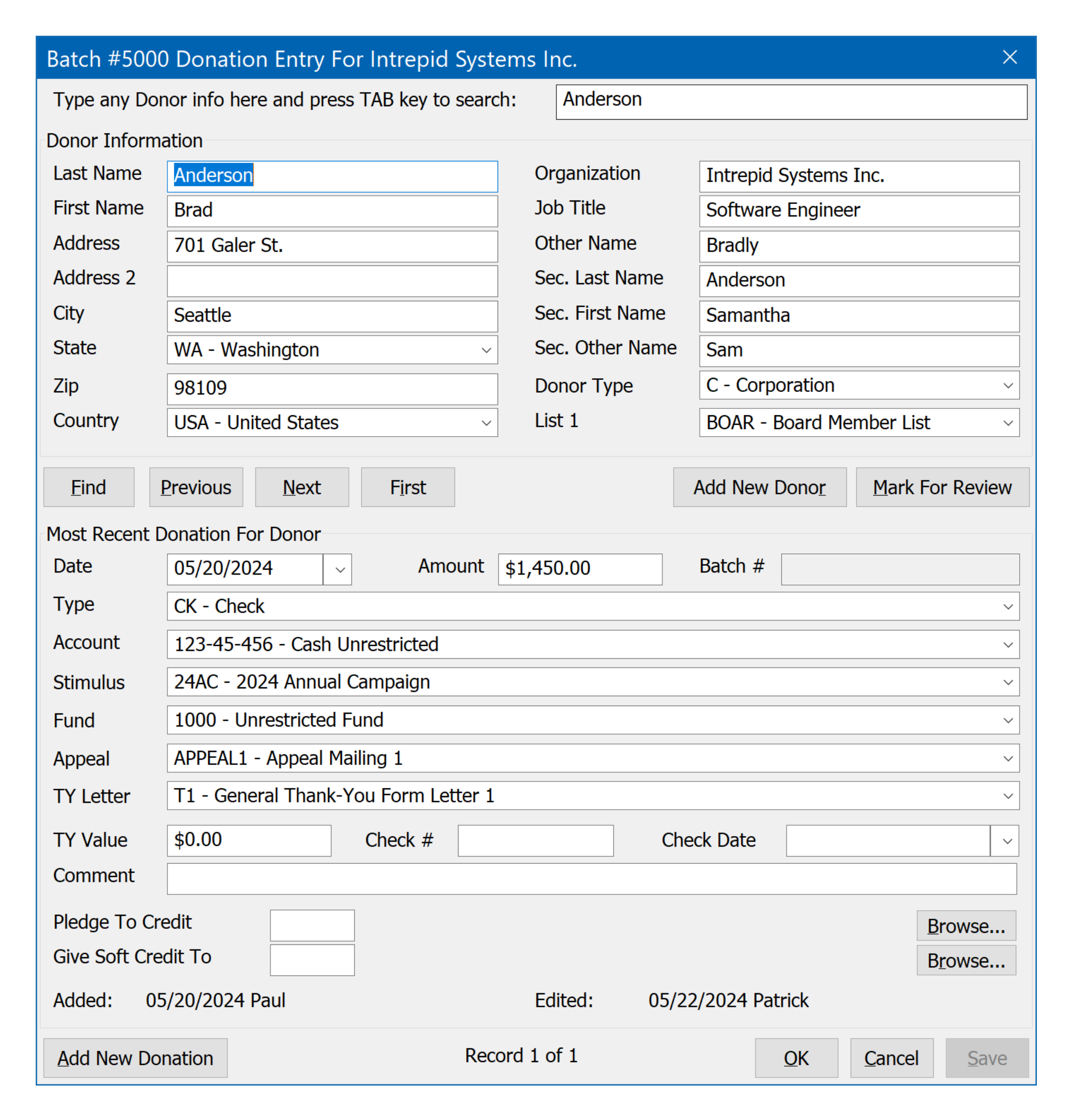
Standard Batch Donation Entry

The standard batch donation entry option should be used if you will be searching for the donor/prospect by various fields (such as name, address, etc.), and you will possibly be adding donations for new donors who are not yet in the database. To begin a standard batch donation entry session, click on Donor, Batch Donation Entry. You will then see the following dialog:



Every batch donation entry session in DonorQuest is assigned a unique batch number, which is stamped into each donation added during the session. DonorQuest will default to the next available batch number, which is normally one more than the previous batch number. You may enter a special number for your donation batch if you wish, but normally

it is best to simply accept the batch number DonorQuest suggests. Click OK on the above dialog to accept the entry. You will then see the standard batch entry form which looks like this:



When the form first appears, it will position itself on the first donor in the database, showing their address and most recent donation. Since the batch entry form is designed for speedy data entry, all of the buttons on this form have shortcut keys. So you can search donor records and add new donations all without moving your hands away from the keyboard to click with the mouse. Following is a discussion of the buttons of this form, along with their keyboard shortcut keys:

The Find, Previous, and Next Buttons

The Find button here behaves just like the regular Find button of the Main Information view of donor records. It produces a Find dialog which lets you search by various fields. However, instead of showing you a data grid of all name/address records matching your search, the first matching record is shown in the batch entry form, and you may use the Next and Previous buttons to view each matching record until the correct one is found. If no existing name/address record is found for the new donation, or if you know in advance you are only adding donations for new donors, you can click on the New Donor button to add a new completely new donor record. The shortcut keys for these buttons are Alt-F, Alt-P, Alt-N, and Alt-O. If you have the Flex Find feature enabled for your user account, you will also see a Flex Find search control at the top of the batch form which you may use for searching just as you do in the regular Main Information window.

The First Button

The First button will move to the first name/address record on file, or if you have done a Find or Flex Find, it will move to the first record matching your search. Keyboard shortcut is Alt-I.

The New Donor, And Mark For Review Buttons

The New Donor button will immediately add a new name/address record. Normally this button is used after you have first tried to find an existing name/address record for the new donation you are about to add. If you know for sure that all of the donations you are adding are for new donors, then you can simply click the New Donor button for each donation without first doing a search. Be sure to fill in the name/address information for the new donor, then click the Save button (or type Alt-S). If you need to enter information for the new donor in fields not available in the limited batch entry form, then click the Mark For Review button. This will tag the donor's account for later review in a Selection Result which will automatically be created following your batch session. This automatically created selection will give you full access to all of the data fields in DonorQuest, allowing you to fill in the additional information for the new donor. Keyboard shortcut for these buttons are Alt-O and Alt-M, respectively.

The New Donation Button

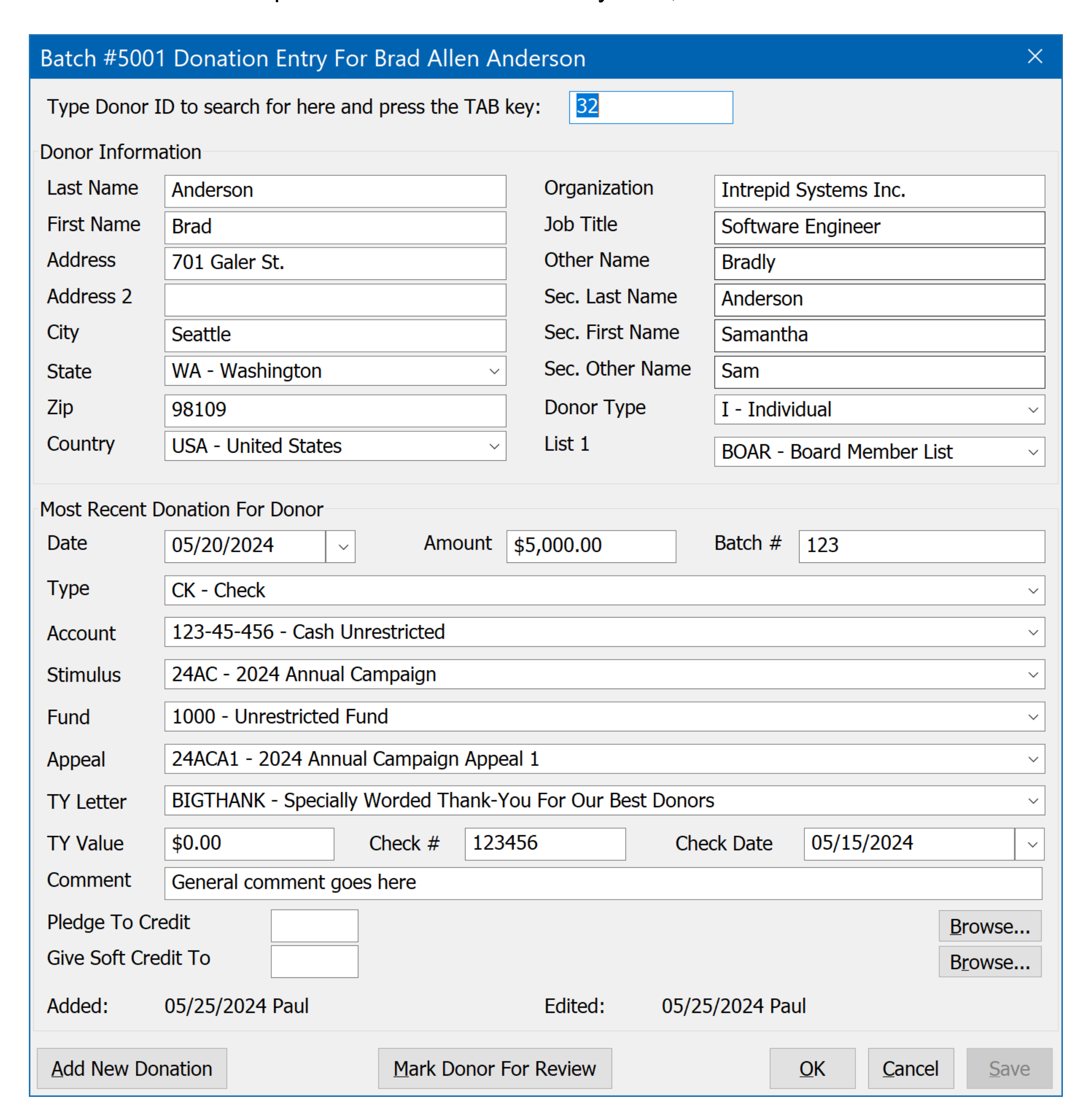
The New Donation button will begin entry of a new donation for the currently displayed donor. If you have donation defaults set, they will be automatically loaded into the donation fields. When you have entered all of the information for the new donation, click the Save button (or type Alt-S) to save it.

The Ok, Cancel, and Save Buttons

The Save button performs double-duty, being used to save a new donor's name/address information (or edit changes to an existing name/address), and it also serves to save new donations as they are added. The Ok and Cancel buttons behave as in other DonorQuest forms. Keyboard shortcuts for the Ok, Cancel, and Save buttons are Alt-O, Alt-C, and Alt-S, respectively.

ID-Based Batch Donation Entry

The ID-based batch entry in DonorQuest is essentially the same as the standard batch entry, expect that it is optimized for a scenario in which you are entering donations from a solicitation of records already in DonorQuest. So you know in advance that you will not be adding any new constituent (name/address) records, but rather only looking up existing constituents to add gifts to. It is also designed specifically for the case in which the unique donor ID number from DonorQuest has been included in the solicitation you sent out for which you are now receiving donations, so that you have it handy from the donation response cards when you are entering the gift. The ID number allows you to precisely lookup the exact donor account for the new gift by entering the donor ID number in the search blank at the top of the ID-Based batch entry form, as shown here:



Pressing the Tab key after entering the ID to search for will immediately bring up the existing account, allowing you to proceed with the entry of the new donation. Because the search by ID is precise, there are no navigation buttons on this form. But otherwise it behaves the same as the standard batch entry form. This form also works well when you have the Donor ID encoded in a bar code on the donation response cards - all you have to do is scan the bar code to bring up the correct constituent. Such a bar code could also be used to automatically populate specific key fields for the new donation, such as the Donation Stimulus.

6.6 Pledges Table



Following is a description of the pledge fields in DonorQuest. This list includes some fields automatically maintained by DonorQuest for reporting purposes, but not shown in the pledge form. For some background information about pledges and example use, please first read the Quick Start topic on the Pledges button.

Start Date

Starting date for a specific pledge. DonorQuest will normally accept only valid dates of the form (mm/dd/yy), however you can set the date validation to date standards for countries other than the U.S. by clicking on User, Change Your Personal Settings.

Stop Date

Ending date for a specific pledge. The start and end dates together define the period of time for which the pledge is active and regular payments are expected, based on the Payment Frequency.

Pledge Amount

DonorQuest will accept fixed 2-decimal place numbers, from 0.01 up to 9,999,999,999.99.

Payment Amount

This is the amount of the periodic payment expected from the donor. The payment interval is determined by the Payment Frequency.

Payment Frequency

This is the interval of time between pledge payments. Available periods are Monthly, Quarterly, Semester, and Yearly.

Pledge Type

The pledge type field is typically used to store the method of payment, such as cash, check, charge, etc. DonorQuest will accept ten alphanumeric characters for this field. The pledge type corresponds to the Donation Type field for donations, and the two share the same drop-down code table.

Pledge Account

Corresponding to the Donation Account field and using the same drop-down code table list, the pledge account is typically used for accounting purposes to track deposit account codes. This field is capable of storing a cash flow account number up to twenty characters long. Since pledges are simply promises to pay and not actual cash flow (they become cash flow as payments are made as donations), the pledge account field is used more for projection reports as opposed to actual cash received reports.

Pledge Stimulus

A character code up to 15 characters long for each pledge which identifies why a donor made the pledge. It corresponds to the Donation Stimulus field, and in fact shares the same drop-down code table. Since pledges are usually stimulated by campaigns, the pledge stimulus for each pledge is also normally the same as the donation stimulus of credited donations.

Pledge Fund

The Pledge Fund is used to categorize pledges -- usually how the money is to be spent. Think of it as the pledge designation, perhaps honoring an earmark the donor wishes to apply as to how the pledge is to be used. This is an alphanumeric code up to 15 characters long, and corresponds to the Donation Fund field, sharing the same drop-down code table. Here are some examples:

1000	Unrestricted Fund
2000	Building Fund
3000	Scholarship Fund
4000	Emergency Room Fund
5000	Memorial Fund

Pledge Appeal

A coded field up to 15 characters long for any appeal connected with receiving the pledge. DonorQuest has the ability to track each and every appeal you make for each campaign. As the donations and pledges come in, you will be able to print reports which show the percentage of response and dollar totals you are getting for each appeal, AND for each campaign (Stimulus) as a whole. These reports can be viewed and printed by selecting Reports, Donation/Pledge Statistics. From there you would open the Stimulus or Appeal tables to see statistics on response rates for both donations and pledges. There are columns showing projected revenue (i.e. if all pledge balances are fully paid) and actual revenue (outright donations not applied as pledge payments). Giving statistics are also maintained for Donation/Pledge Type, Account, and Fund codes. The Pledge Appeal corresponds to the Donation Appeal field, and shares the same code table.

Pledge Comment

Each pledge has space for an optional comment. This comment should specifically apply to the pledge, and not to the donor in general (general comments about the donor should go in the donor's Notepad).

Renew

This is a yes/no field. If checked, the pledge will be automatically renewed after running a batch process. When pledges are renewed, a new and identical pledge is created (leaving the existing one intact), with new begin and end dates which span the same amount of time as the original pledge in the next year. The renewal process is convenient when using the pledge facility to accommodate recurring payments, such as annual membership dues for special clubs or associations. The batch process to renew pledges is initiated by selecting System, Renew Pledges Due For Renewal.

Pledge ID

This is a unique ID number within each donor account for each pledge, automatically assigned by DonorQuest when a pledge is created. This field is needed to unambiguously link incoming donations to existing pledges. It corresponds to the pledge to credit field for each donation.

Amount Paid

This field is maintained automatically by DonorQuest. Whenever a donation is designated as payment towards a pledge, the amount paid for the pledge is automatically updated. The pledge amount paid is also updated whenever a linked donation is deleted, or the dollar amount of a linked donation is changed.

Balance

This is the difference between the amount pledged and the amount paid.

Matching Gift Receipt

When a pledge is automatically created by DonorQuest as part of the matching gift feature, the receipt number of the donation which caused the matching pledge to be created is stored here. For more information on matching gift donors, see DonorQuest Linkages.

Matching Gift Percentage

When a pledge is automatically created by DonorQuest as part of the matching gift feature, the percentage of the donation which caused the matching pledge to be created is stored here. For more information on matching gift donors, see DonorQuest Linkages.

6.7 Memos Table



Following is a description of the Memo fields in DonorQuest. This list includes some fields automatically maintained by DonorQuest for the datasheet view and for reporting purposes, but not available for editing. For some background information about Extra Addresses and example use, please first read the Quick Start topic on the Memos Button.

Memo Code

An alpha-numeric coded field up to ten characters long. This code is chosen from a list of user-defined codes and describes the data which is entered in the companion Memo Text field. The Memo Code is also used to alphabetically order the memo entries on reports and in the memo datasheet window. These memo codes are used to label the associated text, and are very useful when you wish to control which memo lines print on a given report. Memo entries can be treated as simple user-defined fields, and specific memos can be fetched based on their code for reporting and exporting, just as you would do with a built-in fields (see the MemoTextFor() function for more on this).

Memo Text

A general text value up to 100 characters in length, serving as the data which the companion Memo Code field defines. As is mentioned in the quick start guide for memos, the function of the memo window can extend far beyond that of simply storing general one-line comments about donors. It can actually be used in very sophisticated ways to create new fields which are customized to your needs, and only used for the donor accounts which need them. For example, DonorQuest does not currently have fields for the donor's musical taste or favorite hobby. If you had a need to store such information, you could establish memo codes for each of these new fields. For example, the memo code MUSIC could be created and used to store musical taste, and HOBBY for any hobby a given donor may have. These codes would be added to the memo code table, allowing you to create new reports which key off these new virtual fields you have created. Note that DonorQuest also supports true user-defined fields with specific data types (date, numeric, character), but the downside of true user-defined fields is that they must be added for each constituent account and appear on forms whether or not they are needed. Using the DonorQuest Memo facility allows you to track odd or infrequently assigned information for only those constituent accounts which need the information tracked.

Memo Number

Maintained automatically by DonorQuest, this is a unique number identifying the memo record. For each donor account, memos are numbered from one, going up in the order the memos were created.

Memo When Last Edited

This field is maintained automatically by DonorQuest and is set to the date when changes

were last made to a memo.

Memo Who Last Edited

This field is maintained automatically by DonorQuest and is set to the user name of the DonorQuest user who last made changes to the memo.

For some examples using the memo feature and some sample dialogs, please also read the memo section of the Quick Start Guide.

6.8 Extra Addresses Table



Following is a description of the Extra Address fields in DonorQuest. For some background information about Extra Addresses and example use, please first read the Quick Start topic on Extra Addresses. On many field menus in DonorQuest and in the field headings below, Extra Address is abbreviated XA:

XA Last And First Names

Extra address last and first names are for informational purposes only, and are not normally used on mailing labels and mail merge correspondence -- that's the job of the Salutation.

XA Second

The Extra Address Second Name is meant to be used when the donor is staying as a guest in someone's home at times during the yewar, or at a hotel, or any case in which you may need to include an in care of name in order for the mail to be properly delivered. The contents of the Extra Address Second Name will appear beneath the Salutation line on mailing labels.

XA Salutation

As with Salutation 1 for the main biographical record, the Extra Address Salutation is essential because it is used on the first line of the address block. The Extra Address First and Last Name fields are for reference purposes only and are not actually used to form the address for mailing labels and such -- that's the purpose of the Extra Address Salutation. This allows for maximum flexibility in specifying exactly how a donor is to be addressed with any required title, suffix, and any possible spousal inclusion for the case of a couple. It is the begin all, end all for how the donor sees their name, so you can make it appear exactly according to any particular preferences they have.

XA Address, City, State, Zip

Main address line for an Extra Address

XA Address2

May be used for building or suite numbers in an extra address.

XA City

Extra address city.

XA State

Extra address state. This is a coded field which uses the same validation and pop-up table as the main address state field.

XA Zip

Extra address zip code. As with entry of the main donor address, if you leave the Extra Address City, State, or County fields blank while adding a new Extra Address, then simply enter the zip code and press the Tab key, DonorQuest will automatically fill in the city, state, and county fields for you.

XA County

Extra Address County.

XA Carrier Route

Used for postal discounts and provided by the post office (or a 3rd party service) when you zip+4 process your database.

XA Telephone

Extra address telephone, for informational purposes only. Space is provided for an extension number.

XA Start Date

The starting date for which the extra address is valid. As mailing labels are printed, DonorQuest compares the start and end date of each extra address in a donor's history against today's date. If today's date is between the start and end dates for an extra address, then that extra address will be substituted for the donor's main address on the mailing label. If desired, mailing label reports can be modified to base substitution of extra addresses on other conditions -- such as the extra address code (described below) being a specific value.

XA End Date

The ending date for which the extra address is valid. See description of XA start date above.

XA Code

The extra address code field. Since each donor may have any number of extra addresses, this field should be used to categorize each donor's extra addresses. For example, you might code summer home extra addresses as SUMR, or business extra addresses as BUS. You could also use this field to condition the substitution of specific extra addresses for the main address when mailing labels are printed.

Email

An email address to associate with the extra address. Since each constituent may have an unlimited number of extra addresses, this essentially allows you to store any number of extra email addresses for each constituent. Also, since the Flex-Find feature also searches extra address records, you can easily find any constituent based on any email address on record for them.

XA Miscellaneous

This is basically a comment field to use as you wish. It will support up to 30 characters.

XA When Last Edited

Stores the date when the Extra Address record was last changed in any way. Automatically maintained by DonorQuest.

XA Who Last Edited

Stores the name of the last user to make a change to the Extra Address record. Automatically maintained by DonorQuest.

6.9 Linkages Table



Linkages are used to establish relationships or connections between donors. Through the use of linkages you may create individual solicitor lists, report on all those who attended a related institution or event, denote familial relationships, employer-employee relationships, and so on. Each donor may have an unlimited number of relationships with other donors. For some background information about Linkages and example use, please first read the Quick Start topic on Linkages.

The Jump button of the Linkage datasheet is important enough that it deserves some additional discussion here. This button allows you to jump immediately to a linked donor account, so that you may see their full information including donations, pledges, and of course, linkages to other donors. This technique may be used to traverse the entire web of

relationships in your database, allowing you to discover relationships you may not have known existed. For example, in viewing the linkages of one of your strongest supporters, you may casually jump to the donor's uncle, only to discover that the uncle is a very influential shareholder of a large corporation you have been trying to get a grant from. Since you have strong influence with the nephew, you may be able to get him to influence his uncle to influence the corporation to give you a lot of money!

Following is a description of the fields in the Linkages table:

Linkage Linked To

Shown as This Donor on the linkages form, this is the ID number of a linked donor. When adding a new linkage, you may directly enter the ID number of the linked donor in this field, or you may search for the donor you wish to link by clicking the Browse button.

Linkage Relation Type

Shown as Is Viewed As on the linkages form, this is a coded field which shows how another donor is related. A code up to ten characters in length may be entered here. For example, if the related donor is a solicitee of the current donor, you might use a code like - SOLTEE - to describe the relationship. Since a solicitor/solicitee relationship is reciprocal, you would also want to link the solicitee donor back to the solicitor donor. This is normally done automatically by DonorQuest since you tell it in advance which relationship codes have reciprocals, and what the reciprocal codes are.

Linkage Comment

A general comment that is specific to the linkage being added. May be up to 80 characters in length.

Linkage When Last Edited

Stores the date when the Linkage record was last changed in any way. Automatically maintained by DonorQuest.

Linkage Who Last Edited

Stores the name of the last user to make a change to the Linkage record. Automatically maintained by DonorQuest.

6.10 Scheduled Contacts Table



The DonorQuest contact manager allows you to schedule donor contacts for yourself or for other DonorQuest users. A scheduled contact is essentially a planned interaction between a donor and an individual within your organization. The individual must be a

DonorQuest user and have a DonorQuest user account. Since this functionality is ideal for grant tracking, the contact manager in DonorQuest also has fields specifically for tracking grants.

Each day when you start DonorQuest, you will be reminded if you have scheduled contacts for the day, and of any open (unresolved) contacts from the past. You will also be shown a count of the number of open (unresolved) contacts from the past. At anytime you may view a chronological listing of all the contacts you have scheduled, and the donor account associated with each. For some background information on Scheduled Contacts and an example usage, please first read the Quick Start topic on Scheduled Contacts / Grants. On many field menus in DonorQuest and in the field headings below, Scheduled Contacts is abbreviated as SC.

The contact manager in DonorQuest is ideally suited to facilitate moves management with your top donors. Used in conjunction with the Selection process in DonorQuest to first identify your top donors based on past giving, you may then assign groups of your top donors to multiple workers within your organization, so that they may each take charge of their own segment of donors, using the contact manager in DonorQuest to schedule interactions with each of their donors. The contact manager in DonorQuest is used to store detailed notes about each donor encounter, and to schedule follow-up calls which DonorQuest will remind each user of each time they log in. The Donor, Scheduled Contacts / Grant Tracking, Still Open For You option in DonorQuest will show each worker, based on their DonorQuest user login name, the personal list of Donors they have future interactions scheduled with. This list is editable, so that as each user works their way through the list of Donor interactions they have scheduled for the day, they can record notes about the interaction and optionally schedule a follow-up interaction. For example, if a worker has scheduled phone calls with their segment of donors, they can easily work their way through the calls they have to make today, thanking each donor for their past giving, explaining how their money is directly making a difference, and asking them to consider an additional pledge or gift. If a donor says they may be in a better position to make a substantial pledge in a couple months, the worker can record that, and immediately schedule a follow-up call between themselves and that donor in a couple months. And as the worker is making their way through their call list for the day, they have complete access (depending on their user rights), to all of the donor's information - past giving history, pledge history, etc. - as they are talking with the donor.

Following is a description of the fields in the Scheduled Contacts table:

SC User Name

The user field will default with the user currently logged on. The names in this field are drawn from the list of user accounts within DonorQuest. You may schedule a contact for another DonorQuest user by selecting a user name from the drop-down list. Typically, you will leave your name here if the contact is between you and the donor.

SC Description

The description may be up to 150 characters long, and is used as a brief one-line label for each contact. The more detailed chronicle of contact events which occur over the life of a contact should be entered in the paragraph-oriented contact notes field.

SC Action

The Contact Action is a coded field which may be up to ten characters in length. It is similar to the description in labeling what the contact is for, but it is more general and chosen from a list of standard codes defined by your organization. It is basically an action-item for the contact -- what needs to be done to fulfill the purpose for which the contact record was created. Some example codes would be CB for Call Back, GR for Grant Request, etc.

SC Notes

The Contact Notes field is used for a paragraph-oriented chronicling of all contact events for the contact -- all the times you contacted the donor by whatever means regarding the action item for which the contact was created. Sometimes unscheduled interactions with a donor -- a call from them for example -- will merit creating a new contact record just to make note of the call and what you talked about. If no further action is required, you can create the new contact record for the donor, make the notes, then close the contact all at once. Closed contacts remain in a donor's history and can serve as a valuable searchable resource to know what sort of interactions you and other people in your organization have had with the donor over time. It can be especially helpful for you to review past contacts for the donor if you are about to call them for any reason, but especially if you are going to be asking for their support. Having all past interactions with a donor at your fingertips can help you to have a more personalized conversation with a donor, helping them to feel a more personal connection with your organization and mission. The Contact Notes field is unlimited in length and probably the most important of all the contact fields. Since it is unlimited in length, you can, for example, copy and paste an entire email conversation into a new contact record if the email is something you think important enough to have in the donor's record.

SC Next Contact

This is the trigger date for the contact. When the user designated for a specific contact logs into DonorQuest on or after this date, the contact will be included in the reminder which shows the user how many open contacts they now have that have come due. The login reminder will continue to include a contact until the contact is closed, or the contact date is changed to again be in the future. Note that this field is abbreviated as simply Contact Date on some displays.

SC Last Contact

This is the date when the designated user last interacted with the donor regarding the contact. Since there may be several interactions with a donor regarding a specific contact before the contact is finally closed, the SC Date (described above) may be reset several times. The last contact date shows at a glance how long it has been since the donor was last contacted concerning the specific issue for which the contact was created. A more detailed chronology and narrative of donor interactions over the life of a contact should be entered in the contact notes field.

SC Status

The status of a contact is either open or closed. In the database this status is stored simply as an O for open, and a C for closed. Open contacts are included in the DonorQuest login reminder shown to all users with contacts which have come due. When a contact is closed, it is no longer included in the login reminder, and simply becomes part of the respective donor's history. On the contacts form, the status is set by clicking one of the two buttons labeled Contact Open and Contact Closed.

SC Grant Type

When the Scheduled Contacts facility is used to track grants, the Grant Type is a coded field which defines the type of grant being sought. It is a coded field which can support codes up to ten characters in length. Some example codes are CORP for corporate grand, and FOUND for foundation grant. However, as with all coded fields in DonorQuest, you are free to create new codes for this field.

SC Grant Date Request Made

This is the date the corporation or foundation from which you are seeking a grant was first contacted by your organization with a grant proposal.

SC Grant Date Request Acknowledged

This is the date the corporation or foundation from which you are seeking a grant first responded to your request.

SC Grant Date Decision Made

This is the date the corporation or foundation from which you are seeking a grant made a decision regarding the grant.

SC Grant When Payment Is Due

When a grant is given, this is the date when the first grant payment is expected.

SC Grant Status

The Grant Status is a code field which indicates the status of the grant at any point in time. It's values will generally change from PENDING to either APPROVED or DENIED. You can define additional intermediate status codes for your organization. Having status codes allow you to run reports which, for example, could show only those grants which are currently pending, just those which have been denied, etc. The code values for this field may be up to ten characters in length.

SC Grant Amount Requested

This is the amount you are asking for in the grant.

SC Grant Amount Granted

This is the amount the corporation or foundation decided to fund.

SC Grant Amount Paid

This is a running total which DonorQuest will automatically update for you. Sometimes grants will be funded in one lump sum, other times they will be funded in payments over time. In both cases, grant revenue should be recorded as donations in DonorQuest. A connection is made between donations and grants via the Donation Stimulus and Grant Donation Payment link fields, which share the same drop-down list of Stimulus codes.

SC Grant Donation Payment Link

The Payment Link field is tied into the Donation Stimulus code table, so both fields share a common list of stimulus codes. When a grant is funded, you should create a new donation stimulus code that is specific to the grant. You will then enter this code in the Grant Donation Payment Link field, and also enter the code for any donations which are intended as payments towards the grant.

SC When Added

The date the contact record was created.

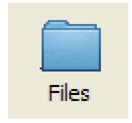
SC When Last Edited

Stores the date when the contact grant record was last changed in any way. Automatically maintained by DonorQuest.

SC Who Last Edited

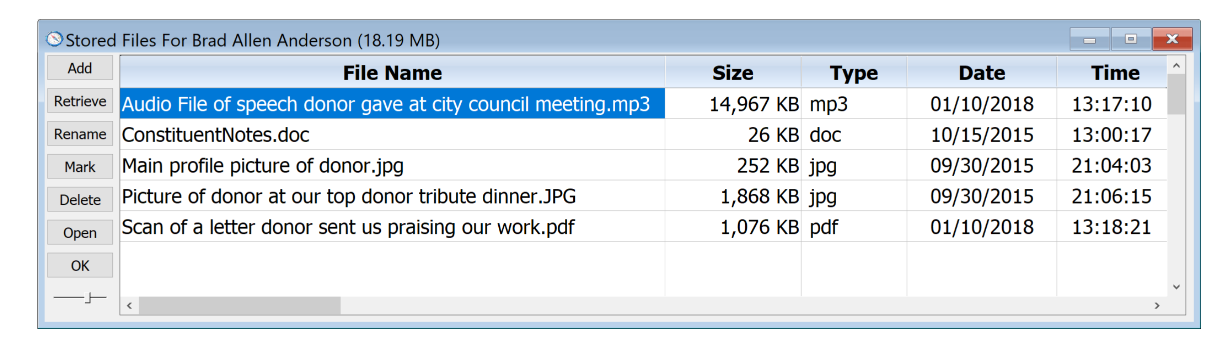
Stores the name of the last user to make a change to the contact grant record. Automatically maintained by DonorQuest.

6.11 Stored Files



The Files button on the DonorQuest toolbar allows you to store and retrieve an unlimited number of files of any type (i.e. PDF, Word, Excel, Picture, Sound, Video, etc.) in each donor's record. The files are donor-specific and are shown in a standard DonorQuest datasheet for each donor, just like donations, pledges, contacts, etc. Stored files may be opened in place by double-clicking on them. They may also be downloaded to your workstation, provided you have the stored file download access right turned on for your account in DonorQuest. There are five user rights associated with stored files in DonorQuest - the ability to see the names of stored files, add to stored files, retrieve

stored files, view/edit stored files in place (without having to extract and re-add them), and the right to delete stored files. Just as the Donations icon shows the number of donations a donor has, the Files icon shows the number of stored files stored in each donor's account. This allows you to know at a glance whether there are any stored files for the current donor, even when Stored Files window is not visible. When you click on the Files icon, the Stored Files window will open, which looks like this:



Double-clicking a file name will open it in place. You may also use the Mark button to mark multiple files for retrieval to your workstation (or any folder you have access to), or for deletion, depending on how your user rights are set in DonorQuest.

Adding A New File

Clicking the Add button will open a standard Windows File Open dialog, allowing you to navigate to the file you wish to add. You may add absolutely any type of file. If a file of the same name already exists in the stored files for the current donor, DonorQuest will ask you for confirmation before replacing the existing file. If your system administrator has placed limits on the size of files which may be added, or the combined size of all stored files for each donor account, DonorQuest will notify you that it can not add the file, referencing the specific restriction in the message it displays. If the file you select is added successfully, the Stored Files window will immediately update to show the name and other stats of the added file.

Retrieving A File

Clicking the Retrieve button will open a folder selection dialog, allowing you to select a folder to receive a copy of the currently highlighted file. You may choose any folder to which you have write access (i.e. a folder on your workstation, or a shared folder on your network). If you have used the Mark button to mark one or more files, all of the marked files will be retrieved once you choose the destination folder.

Marking A File

You may mark any number of stored files for the current donor using the Mark button. Marked files will all be processed in a batch when using the Retrieve or Delete buttons. The marked status for files is temporary and the marks will be removed when the Stored Files window is closed, or you move away from the current constituent record.

Deleting A File

The Delete button will permanently delete the current file, or all of the files you have marked using the Mark button. This can not be undone except by restoring from a backup, so delete files with great caution, especially if you have marked several files for deletion. DonorQuest will prompt you before performing the deletion.

Opening A File

The Open button performs the same action as double-clicking a file name - it will attempt to open the file in place, using the appropriate application. For example, if you attempt to open a stored Word document, DonorQuest will first open Word, then direct it to open the document. Note that you will be editing the one copy of the opened file directly, and any changes you make to it will be saved to the one copy maintained in the donor's record by DonorQuest. If you want to use a temporary or offline copy of a stored file, you should retrieve a copy of the file to a folder on your workstation first, then open that copy. You may then choose to add the edited version back. Note that adding a file back will replace the older version if the file has the same name. DonorQuest will prompt you for replacement of an existing file before it does the replacement.

See also: The Stored Files Button.

6.12 Memorial Gifts

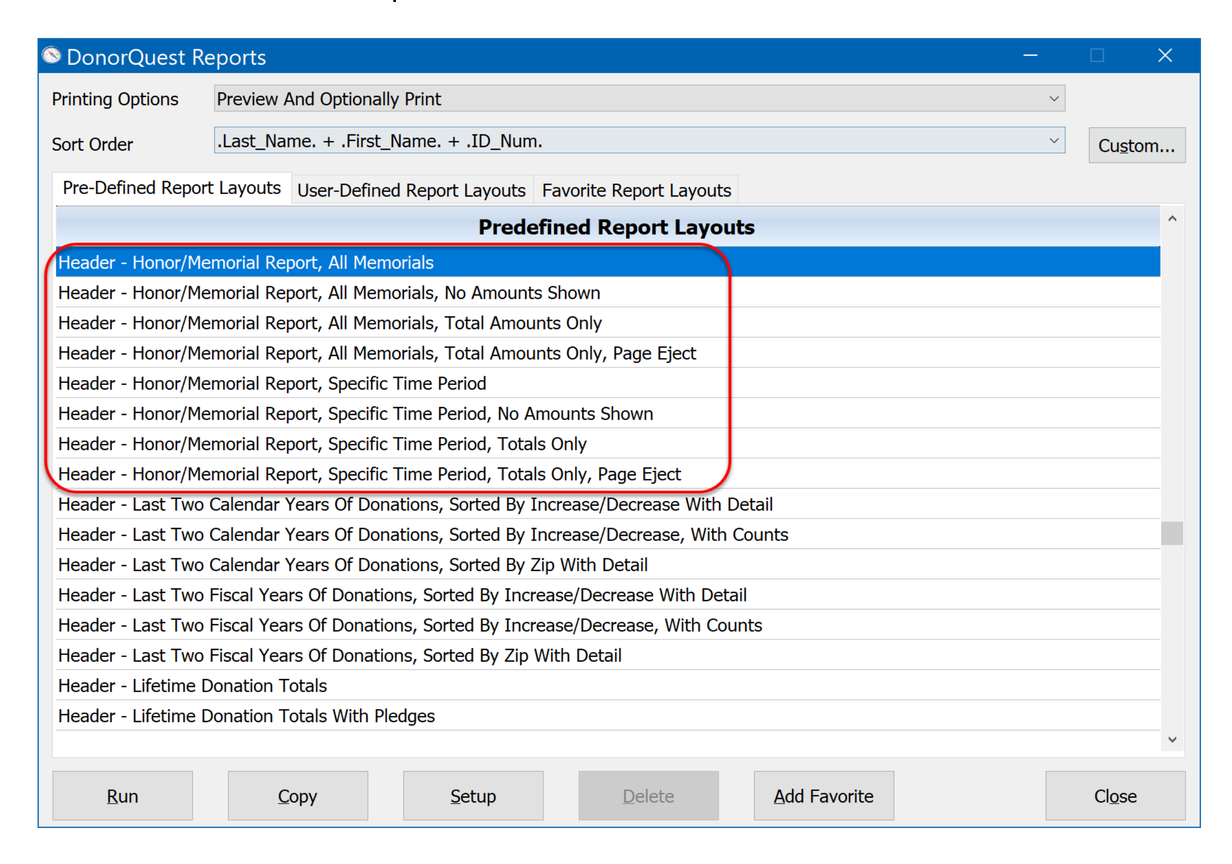
Memorial Gifts in DonorQuest are implemented using the Soft Credit feature. The actual donors who give towards a memorial will have the gifts they give entered in their accounts as hard gifts, but then during entry the gifts will also be soft credited toward the memorial account for which the donor intends the gift. Before you can soft credit a donation to a memorial account, you need to create the memorial account to receive soft credits. To do this, go to the donor Main Information Datasheet and click on the Add button to add a new donor (this is the same process used in creating a new donor account). In the organization name, type the name of the memorial fund. For example, type: John Fitzgerald Kennedy Memorial Fund. Position the cursor in the Type field (this is the donor type), then click the drop-down arrow to the right and select Memorial Record. The actual code must be M or MEM for the DonorQuest Honor / Memorial reports to work properly.

Enter all other pertinent information. For example, the address fields could contain the address information for the surviving relative to which reports on memorial giving should be sent. Click OK to save the new memorial account and close the Donor Edit Form. Next go to the donor who is giving the memorial donation and begin adding a new donation for them. Key in the appropriate amount of the memorial donation. If it is a new memorial, you should create a new Donation Fund code so that the gift may be counted in the statistical totals towards the specific memorial. You can create a new memorial code on-the-fly by simply typing one in the Donation Fund field and pressing the Tab key. You will be prompted for a description for the new memorial fund.

The last step in the Memorial Donation is to apply a soft credit. Click Browse button next to the Give Soft Credit To blank of the donation form to search through your donors and select the proper memorial donor account (for example, John Fitzgerald Kennedy Memorial Fund). Be sure and click within the title for the Organization column to order the browse by Organization name (which is where the name of the memorial account will be) so that you can search that column as you type the name of the memorial fund. You can

use the incremental search by simply typing the first few letters of the name (i.e. John F should be good enough for finding our example memorial). Once you have the proper memorial account highlighted in the Browse Find Window, click the OK button to select it as the memorial account. This completes the Memorial Gift donation entry process. Save and close the donation window by clicking on OK.

Once you have one or more memorial accounts setup, you can preview/print some of the various Honor / Memorial reports, shown here:



You may access the DonorQuest report menu by simply clicking on the printer icon on the DonorQuest toolbar.

Topic VII

7 Selections



DonorQuest provides a number of ways to filter, print, export, and manipulate the information in your donor database. The most fundamental method for getting questions answered is to perform a selection. Selections are simply filters applied to your data to narrow it down to specific constituents, donations, pledges, etc., that you want to work with for a given purpose.

The focus of a selection is always one of the seven data tables in DonorQuest (Header, Donations, Pledges, Memos, Extra Addresses, Linkages, or Scheduled Contacts). If you are focusing on the Header table which contains the name/address/biographical information for each constituent, then the Selection Result you get will be one of constituents (donor & prospect records). This is the typical case. However, you may wish to focus on donations meeting a certain condition, such as the date of each qualifying donation having to be in a certain range of time. In this case, the Donations table would be the focus or Source Table of the selection, and the result would essentially be a list of donations belonging to various donors.

Since DonorQuest takes care of the relationships between the seven data tables internally, you could print a list of donations selected from the donations table which also includes donor names, even though that information is in the Header table. The DonorQuest report system takes care of pulling together information from related tables that were not the focus of a given selection. But the reporting system will not bring into a select records which did not qualify for it in the first place. So for example, if you run a selection using Donations as the Source Table and ask for donations made on 03/02/18, you can print a report with these gifts along with the donor names (which will be automatically pulled from the Header table), but the report system will be constrained by your donation-based selection to only print donation records in your result -- those from 03/02/18.

Selections are the starting point for printing many Reports in DonorQuest. The term Report in DonorQuest refers more to the page layout -- the arrangement of columns of data on a printed page. Reports control which attributes of a donor account will be shown and where they will be positioned on the page. *Selections filter data, reports show data.* While some reports may do minor additional filtering if they are specially designed to do so, the major filtering tasks are always accomplished by selections. For example, if you select donors in a specific zip code range, the selection defines which donors will print, and the report layout you choose will control what about each donor will appear on the page -- maybe just the names, maybe the names and addresses, maybe the names and phone numbers, etc.

A single selection may be reused again and again with many different page layouts (reports). Let's say you had a selection of 500 donors in a zip code range you are interested in. Mixing and matching that one selection with different reports, one report

layout could show simply the donor name and address, and another layout could show the donor name and a comparison of yearly giving totals for ten years. But in all cases any report layout you use with that selection will be the same 500 donors -- those who specifically qualified for the zip code range used to create the selection. DonorQuest includes hundreds of pre-defined report layouts, and you can copy and customize any of them, combining them all freely with selections you and other DonorQuest users create.

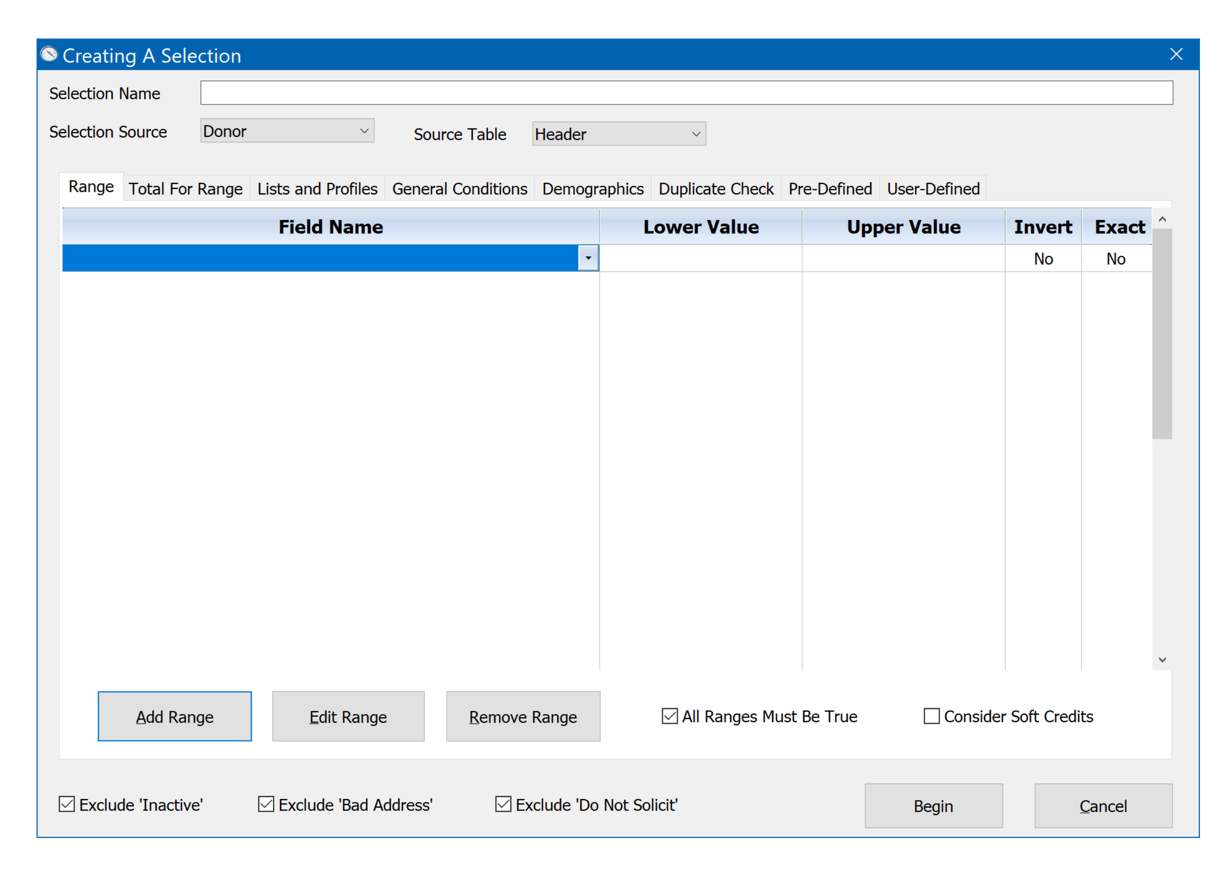
But printed output is just one possible use of a selection result. A selection result can also be used for a data export or creating an Excel spreadsheet with the records from the selection. Or you can use a selection result to make sweeping data changes. For example if you have a selection of donors who's area code is changing, you could do a sweeping replace on the area code for these donors via the selection. Likewise if you had a selection of donations which were mistakenly entered with the wrong campaign code, you could perform a sweeping replace on the donations referenced in the selection, correcting the campaign code in a single step.

Selection results remain in DonorQuest until they are deleted. This is because they are intended to be reused. They can be refreshed easily as your data changes, and you can even change the filter conditions of existing selections. As you add new donor information, or change existing donor information, existing selection results may become outdated. Because of this, DonorQuest allows you to update or refresh existing selection results. A refreshed result will be as complete and up-to-date as the result of a newly run selection, without requiring you to re-enter the conditions of the selection. In addition, the refresh process usually takes only a matter of seconds, since DonorQuest only has to examine the donor information which has changed since a specific selection was last run.

7.1 Creating A Selection



The Select button on the DonorQuest toolbar opens the Creating A Selection window, which looks like this:



There are different types of filters you can use in creating a selection. The Range Filter is the one you will probably use most often, since it is the broadest type of filter, allowing you to select donor information based on range values for any DonorQuest field -- including any custom fields you create. The various types of filters are shown in tabs across the Creating A Selection window. We will explore each of these in separate topics. For now we will explain the general options of the Creating A Selection window.

The Selection Name

The first thing you will enter when creating a new selection is a Selection Name. The name of the selection should be meaningful since it will server as a label for the selection which other users may rely on to know what the selection is about. What you type here does not affect how records are selected, it is simply a description which stays with the selection, and which also prints in the title lines of any reports you use with the selection. Other users can see selections you create, as you can see theirs. The point is to share and not duplicate effort, and having a meaningful name for each selection helps with this.

The Selection Source

The selection source specifies which of the three DonorQuest datasets will be accessed during the selection. All active donors and prospects are maintained in the donor dataset, so that is normally what you will use for the selection source. However, it is also possible to base the selection on the archive or buffer datasets. The archive dataset is where inactive donor and prospect accounts are stored, and the buffer dataset is simply a

temporary holding area where you may have placed copies of existing donor and prospect accounts.

The Source Table

Each dataset has seven tables, each storing a different aspect of a donor's account data. The header table stores the main biographical information for all donors and prospects (name, address, list codes, etc.), and it is normally what you will use for the source of a selection if you are running a mailing list or other constituent-centered report. However, if you wish to select specific donations, pledges, memos, etc., then you should set the source table accordingly. For financial reports in which you wish to filter by specific donations (for a range of time, specific campaigns, etc.) you would choose Donations for the Source Table. Basically, anytime you need to pick and choose which donations go into making up a report, you use Donations for the Source Table. If you're mainly after biographical (name/address) information (to use for a mailing for example), then you choose Header. If you need to filter by pledges, memos, etc., you would choose one of those tables as the Source Table.

While some precomputed donation totals are stored in the Header table for convenience and they are shown on the few Header reports designed to include yearly totals, they are only monetary calendar and fiscal year totals. For totals involving subgroups of donations totalled by anything other than Calendar or Fiscal year, you would again use Donations for the Source Table of the selection, and allow the Report Layout you choose to use with the Selection Result to do the totalling for you.

Basic Exclusions

You may also optionally choose to exclude certain donors from your selection before going into more detail with the specific filter options. For example you might be doing a selection for the donors for which you are going to mail a solicitation. In this case it is easy to simply check the box for Exclude 'Do Not Solicit'. When this box is checked on in the Creating A Selection window, the corresponding checkbox in a donor record must not be checked in order for the donor to qualify. This simply means that putting a check in the Exclude 'Do Not Solicit' box will exclude each donor who has a check in the Do Not Solicit field (found on the Constituency tab of the Main Information Form). This concept works similarly for the Exclude 'Bad Address' and Exclude 'Inactive' options. Note that when beginning a new selection, these exclusion options are on by default to protect you against accidentally doing a solicitation mailing to constituents with a bad address, or those who have been designated as inactive, or who do not want to receive solicitations.

At this point you may enter more specific filtering information, using one or more of the filter tabs. The filter tabs work together, so that any conditions you enter in any of them must all be true for a record to qualify and be included in the Selection Result.

7.1.1 The Range Filter



The range selection filter allows you to specify a lower and/or upper range value for any of the fields of DonorQuest, including any custom fields that you may have created. For example, you could express a range of zip codes, a range of telephone area codes, or a range of giving. For the Range filter, ranges of giving can be for total giving for specific years, lifetime total, or for single donation amount and date ranges.

Range values are simply a way of qualifying donors based on the value of one of their fields being between two specified values. For example, a donor with a zip code of 95117 will pass a zip code range test if you were to specify 95000 for the lower zip code range and 96000 for the upper zip code range. Since the comparison of range values is inclusive, the donor with a zip code of 95117 in our example would also pass if you specified 95117 as the lower or upper zip code range value.

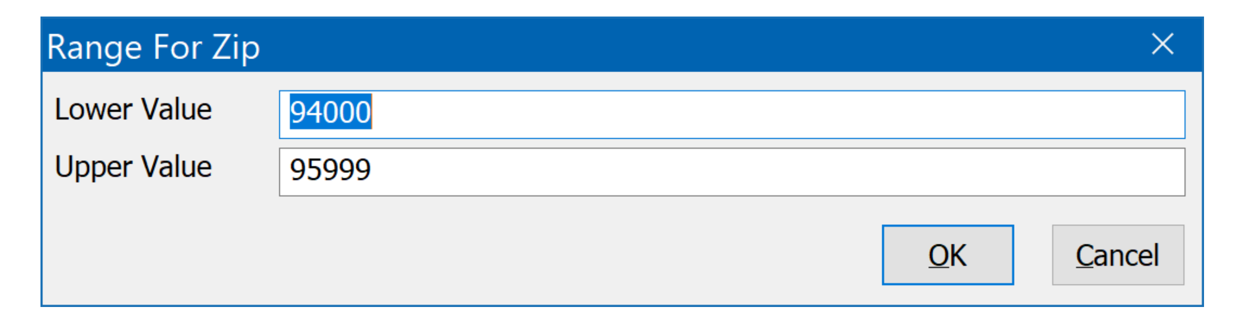
The following example will take you through the steps of performing a range selection which will qualify donors based on their zip code. If you are using the evaluation version of DonorQuest, then the sample database provided will have donors in the zip code range used in the example.

Goal

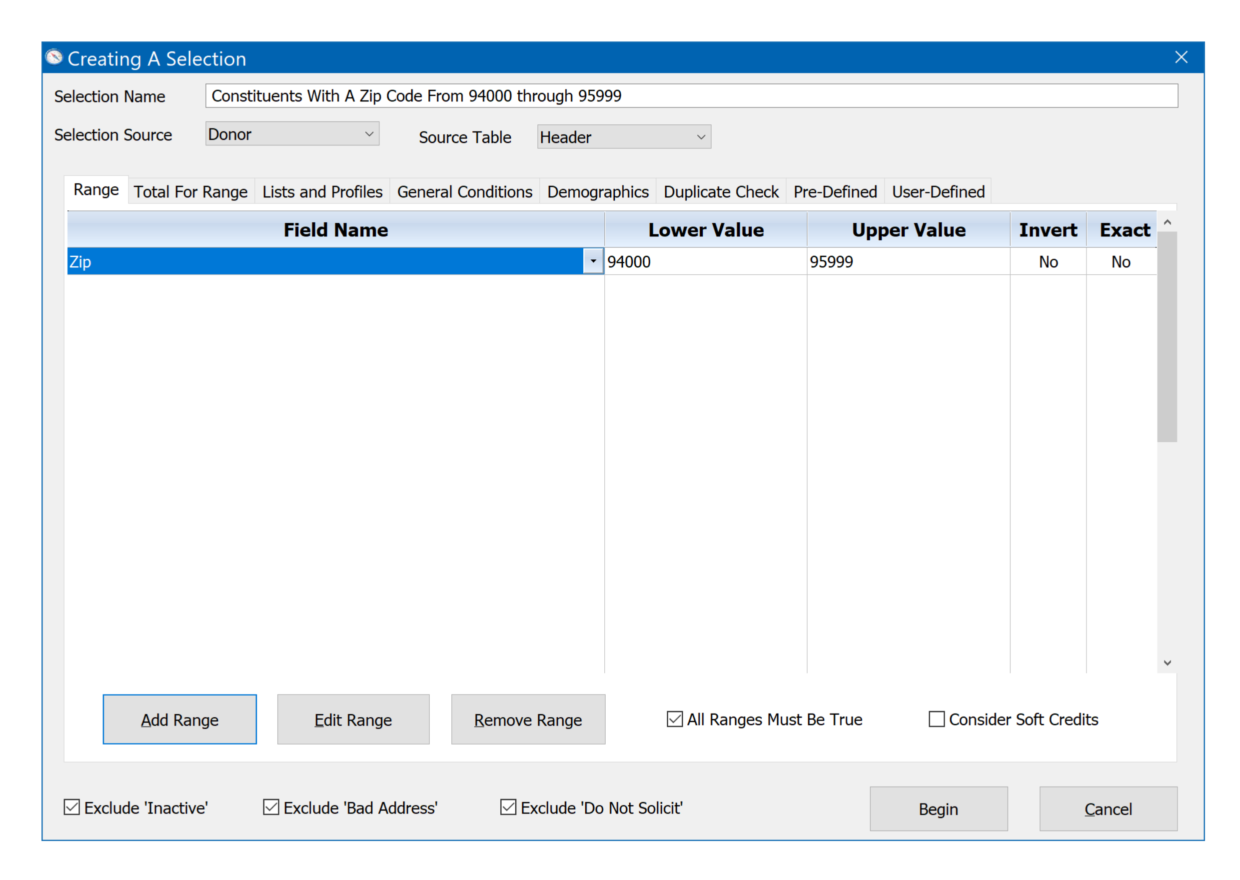
You wish to select all the constituents who have a zip code between 94000 and 95999.

Procedure

1. Click on the Select icon on the DonorQuest toolbar. By default the Range filter table is active.
2. For the Selection Description enter: Constituents With a Zip Code From 94000 through 95999.
3. Click the drop-down arrow for Field Name and choose Zip.
4. Click the Edit Range Button, and enter the following:



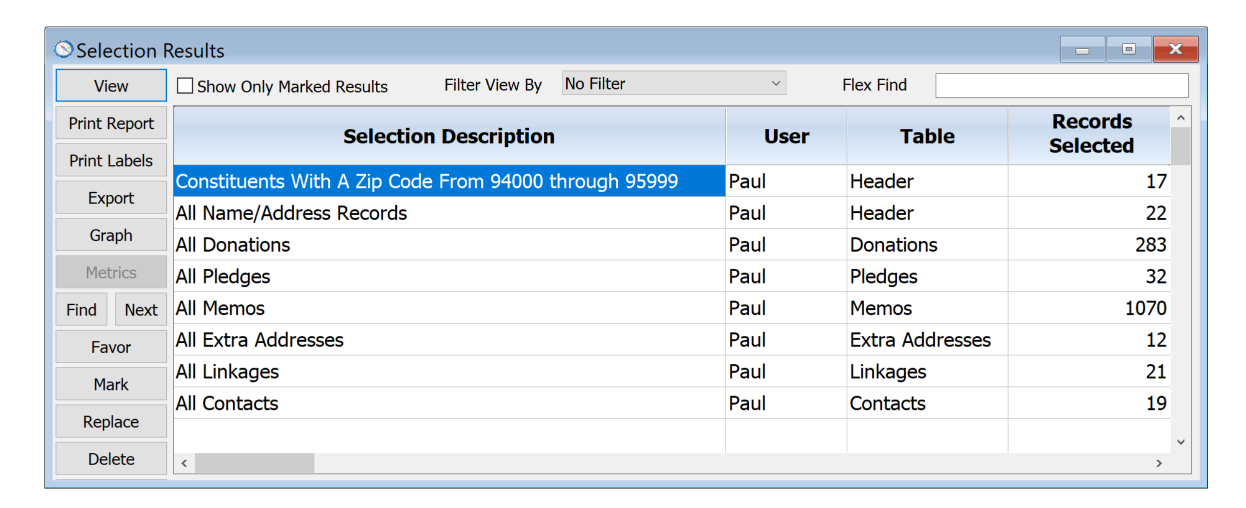
5. Click Ok. The Creating A Selection window should look like this:



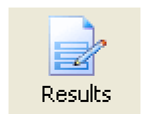
6. Click the Begin button to run the selection.

When the selection has been completed, the Selection Results window will appear. Each time you run a selection, a new entry will be added to the top of the selection results window.

At this point you have many options for using your new selection result. The most common options are shown as buttons to the left of the selection results list window. One of the most common next steps is to view the names of the people in your newly created selection result. You may do so by clicking the View button of the Selection Results window. You may also print the result using one of the many pre-defined DonorQuest report layouts (and any custom ones you create) by clicking the Print Report button.

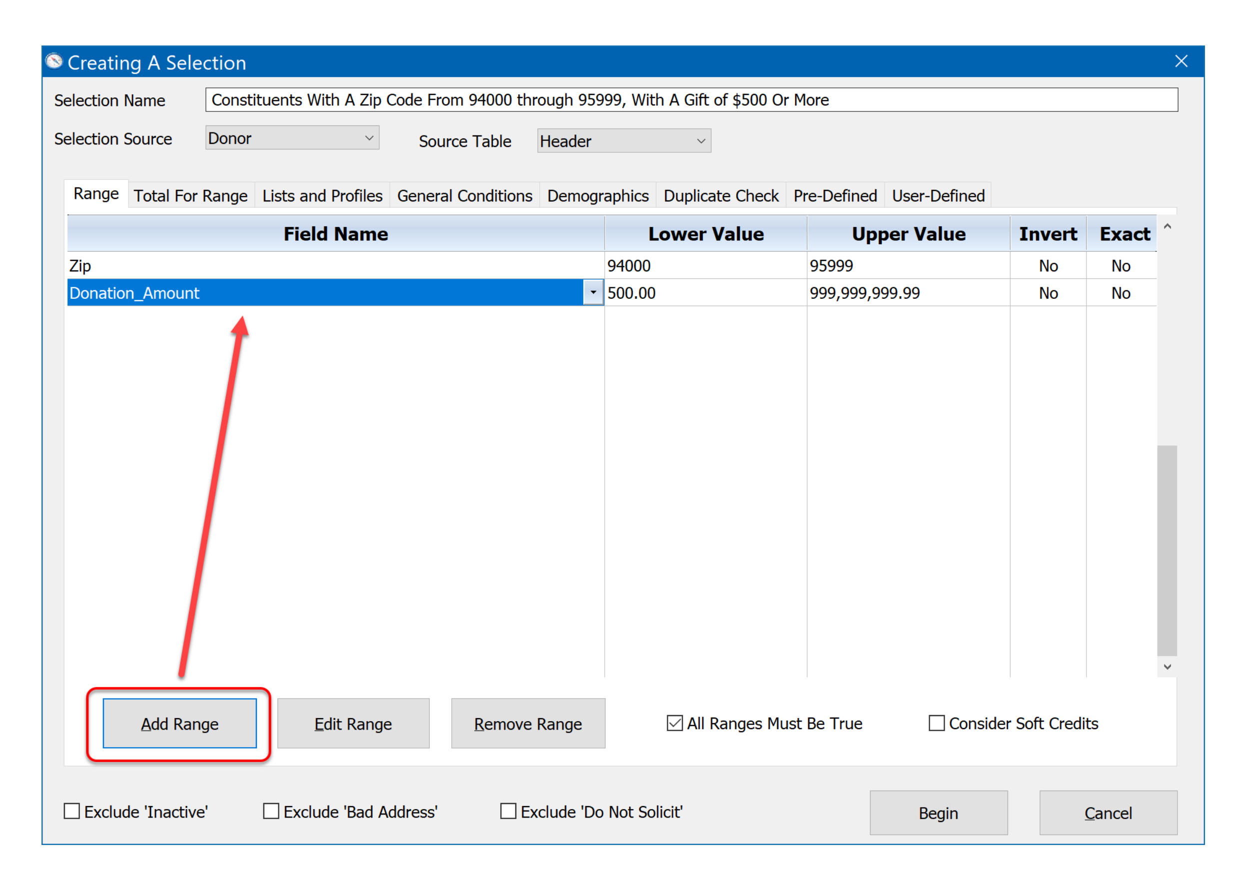


At anytime you may return to the Selection Results window to do other things with your selection (and indeed with any existing selection) by clicking the Results button on the DonorQuest toolbar which looks like this:



Using The ReSelect Feature

Sometimes after viewing or printing a result you realize you need an additional filter condition. For example, in our zip code range selection we may decide that we really only want donors in the zip code range who have one or more single gifts of $500 or more. All we have to do is click the ReSelect button of the Selection Results window. We will then be taken back to the Creating A Selection window, with the previous filter condition(s) just as we left them for the particular selection. All we have to do is add another Range filter condition by clicking on the Add Range button, choosing Donation Amount from the drop-down list for the Field Name column, enter a range of $500 on up, and edit the Selection Name like this:



Note that the field drop-down menu shows the fields in the order in which they are displayed in the data entry forms by default. If you would prefer them to be in alphabetical order by table, then do a right-mouse-click in the white space below the last entry in the Field Name column to toggle that. This preference can also be set under User, Change Your Personal Settings.

Now begin the above revised selection by clicking the Begin button. This will recreate our selection with the updated conditions and selection name. Note that since a donor may have many gifts, the Range filter will automatically search all of them, requiring that just one meet the range condition for Donation Amount. This means that a donor could have a hundred donations, and it only takes one exceeding $500 to qualify the donor. Also, if we had changed the Source Table for the selection to be Donations instead of Header, DonorQuest would have selected just the actual gifts of each donor which meet the $500 requirement (and who also lives within the zip code range), so if you were to print the result using a report such as the, "Donations - Donation Detail Report", only the gifts of $500 or more would show on the report for the donors in the zip code range.

Inverting A Range

In the Range filter, any range you specify may be inverted by double-clicking in the Invert column. When you invert a range, you are asking for the opposite of it. In our zip code range example, if we had double-clicked on the Invert column for the zip code range, we would be asking for donors who are not in the zip code range 94000 to 95999.

Exact Comparison

In the Range filter, if you turn on the Exact Comparison for a condition, you are saying that on the boundaries of the range you want to consider all characters. This applies only to character fields, like Last Name. For example, if you asked for last names Adams through Schmidt, and you turned on exact comparison, the last name Samson would qualify, as would Schmidt, but Schmidter would not qualify because on an alphabetical list Schmidter would come after Schmidt. With exact comparison off, any last name starting with Schmidt would qualify as being in the range.

All Range Conditions Must Be True

If this checkbox is turned on, then every condition of the Range filter must be true for a record to qualify. If this checkbox is not checked, then only one of the Range filter conditions must be true for a record to qualify. So in the above example, with the checkbox on, in order to qualify a donor must both live in the zip code range and have one or more donations of $500 or more. If you were to turn off the checkbox, then a donor would only have to live in the zip code range, or have one or more gifts of $500 or more to be included.

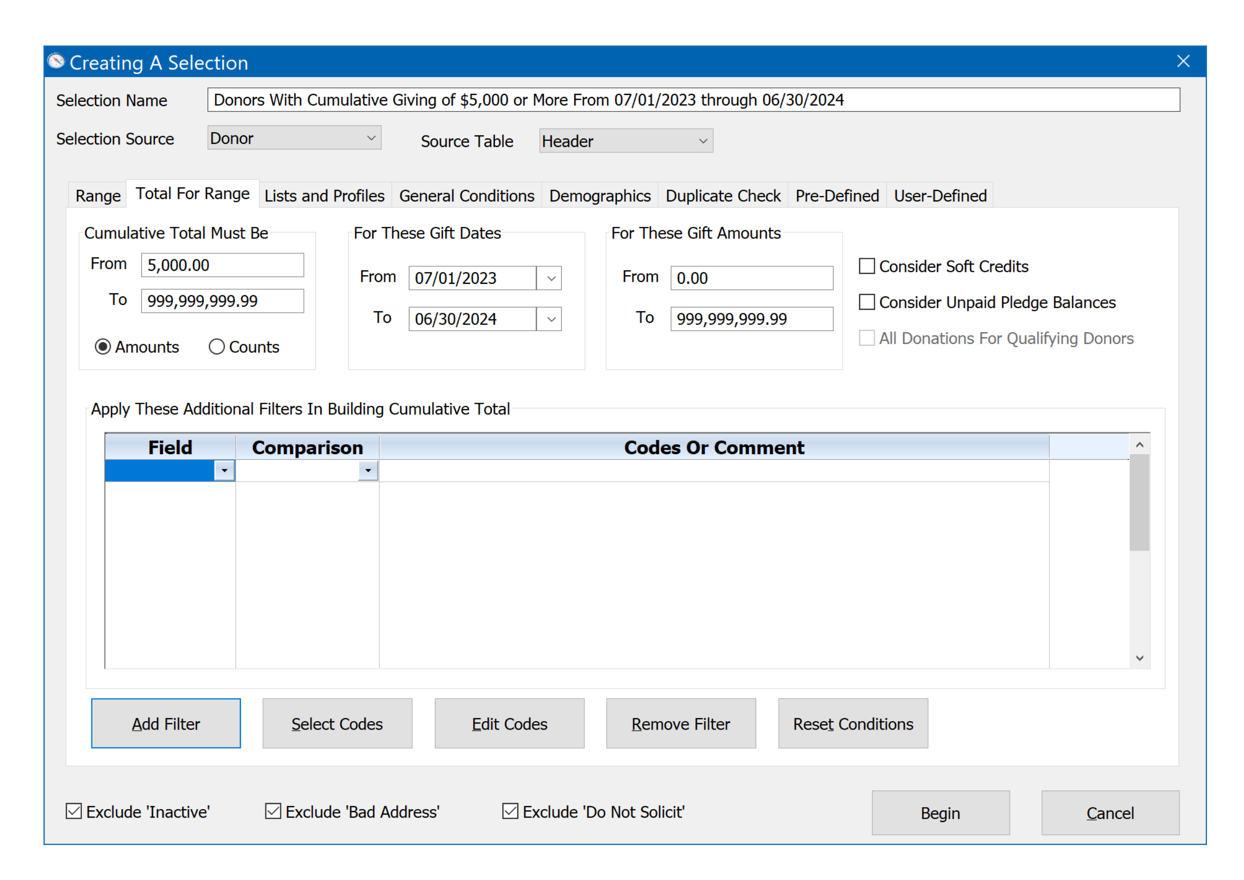
Consider Soft Credits

This Range filter option applies only to conditions applied to donation fields. If it is checked on, then when checking to see if at least one of the gifts for a donor meets the range condition, DonorQuest will also consider any soft credit donations which have been credited to the donor from the actual (hard) giving of other donors.

7.1.2 Total For Range Filter



The Total For Range filter will allow you to create a selection result consisting of donors who, within a particular date range (defined by you), have given a cumulative total amount that is within a particular amount range (also defined by you). You can enter values for this filter by clicking on the Total For Range tab of the Creating A Selection Window. Here is what this selection filter tab looks like, along with some sample filter values:



Usually you will only be concerned with entering values for the, "Cumulative Total Must Be" and "For These Gift Dates" sections. However, if you wish you may restrict the donations which are considered in the selection to those of a specific campaign, or list of campaigns. Also, since DonorQuest supports alternate units for donations (in-kind gifts such as hours, pounds of food, etc.), you are also given the opportunity to include or exclude certain donations based on the donation type with which they were coded at the time they were entered. You may also include or exclude donations from consideration based on donation account, thank-you code, fund, stimulus, or comment. For example, if you wish to select those donors who have given five hundred dollars or more cumulatively between July 1, 2016 and June 30, 2017, you would enter the selection values shown above.

With the selection conditions shown above, DonorQuest would visit each donor account and basically do two things:

1) It would add up all of the gifts for the current donor that were made between 07/01/2016 and 06/30/2017.
2) If that sum is greater than $5,000, it would include the donor in the selection result.

Following is a discussion of each of the options available with the Total For Range selection filter:

Cumulative Total Must Be

This is the focus of the entire filter. It is an amount range which the cumulative total for a

donor must be within for the donor to qualify. The cumulative total for each donor is determined by adding all the donations in the donor's account together which meet the other conditions set forth in the Total For Range filter.

Amounts or Counts

The Cumulative Total may either be for donation amounts, or donation counts. Normally it is for donation amounts, but if you want to select donors who have a certain number of donations which meet the other filter conditions, you may do so by clicking the counts bubble.

For These Gift Dates

The For These Gift Dates range condition applies to the Donation Date in donations. In order for a donation to be included in the cumulative total for a donor, the Donation Date of the donation must be within this range. In the above example, a date range of 07/01/2016 to 06/30/2017 is used. This means that only gifts in this date range will be added together, and then that total must be between $5,000 and $999,999,999.99 for the donor to qualify.

For These Gift Amounts

The For Gift Amounts range condition applies to the Donation Amount in donations. In order for a donation to be included in the cumulative total for a donor, the Donation Amount of the donation must be within this range. Normally your would leave this range as it is by default, which includes all positive donation amounts (DonorQuest supports negative donations for rare case uses, such as tracking campaign expenses).

Consider Soft Credits

Turn this checkbox on if you would like soft credit donations from other donor accounts to be considered when creating the cumulative total for each donor.

Consider Unpaid Pledge Balances

Turn this checkbox on if you would like the balances from unpaid pledges to be considered when creating the cumulative total for each donor. This can be useful if you are selecting donors based on the total commitment they have made to one or more campaigns, both in terms of actual cash received from the donors and what's left for them to pay on their total promised giving.

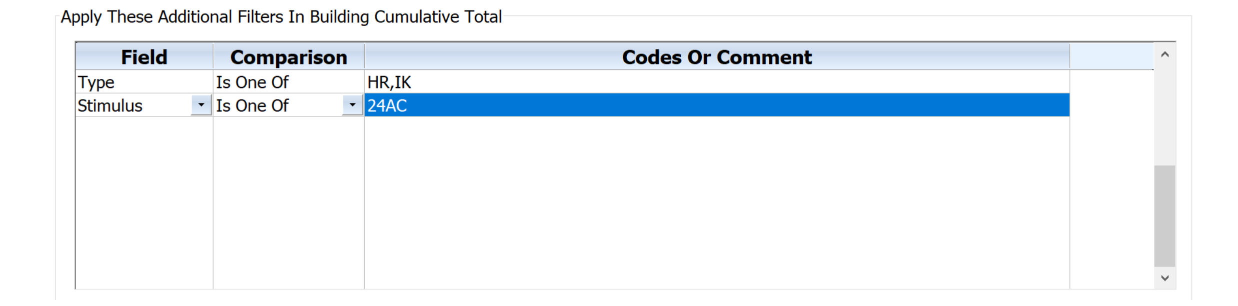
All Donations For Qualifying Donors

Turn this checkbox on if you would like all donations selected for those donors who qualify for the cumulative total. This checkbox option is only available when the Source Table for the selection is the Donations table. If this checkbox is left off during a donation-based selection, then the, "For These Gift Dates" range will also serve to limit which donations may be selected. For example with the checkbox off, if donor John Smith has five donations in his lifetime giving, but only two were within the, "For These Gift Dates" range, only the two donations would be selected for him (provided their sum also met the, "Cumulative Total Must Be" range). If the checkbox were on, then all five donations would

be selected, provided they also met all conditions on any of the other selection tabs (such as the Range and General Conditions tabs). This is useful for queries such as, "Find all the donations given this year for donors who gave a total of $5,000 to the ABC campaign last year."

Apply These Additional Filters In Building Cumulative Total

This option allows you even more control over which donations are allowed into the cumulative total for each donor. You may have any number of additional filter conditions here applied to the Donation Type, Account, Stimulus, Fund, Appeal, Thank-You, or Comment fields. For each condition, you may require that the value of a specific donation field must be one of, or not one of, a list of specific values. For example, if you track non-monetary gifts in DonorQuest, you should specify that the Type of the donation must not be one of the codes which would make it non-monetary. In the example shown below, we are saying that the Donation Type can not be one of HR,IK. HR stand for Hours of Time, and LB for Pounds of Food -- both non-monetary. Multiple codes are separated by commas. This prevents mixing donations of money with non-cash gifts. In our example below we have also specified that the campaign (Donation Stimulus code) must be 17AC for the 2017 Annual Campaign. So all together, these two filter conditions take care to only consider monetary donations for the 2017 Annual Campaign:

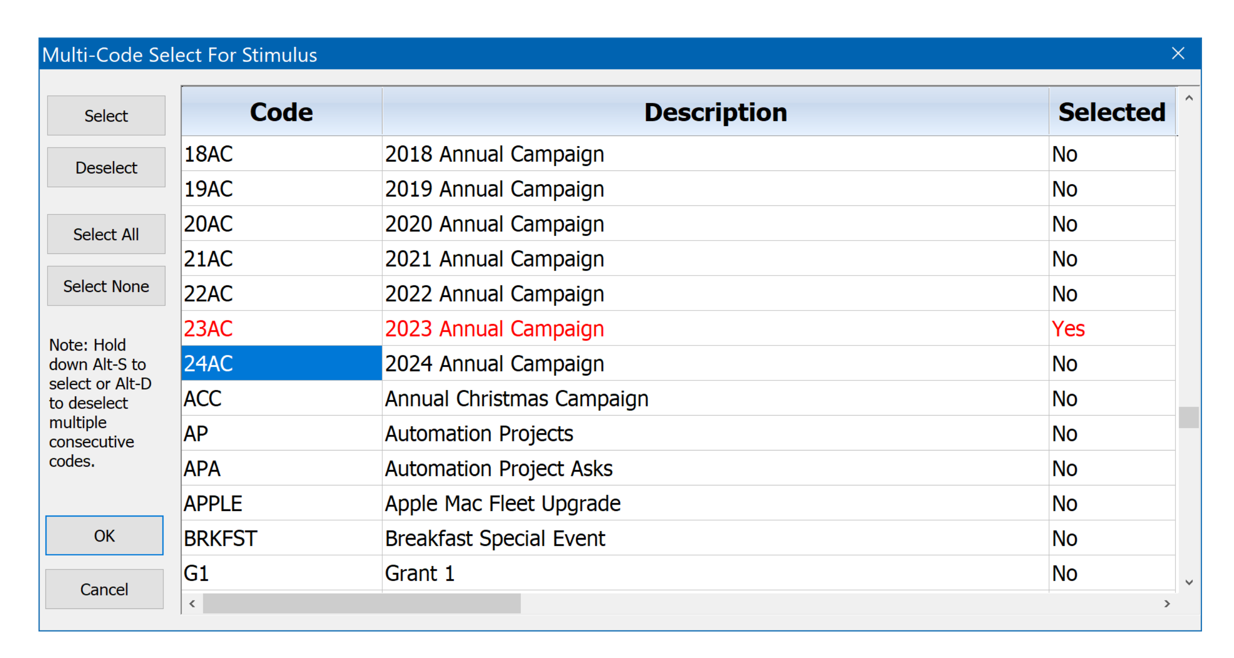


Add Filter Button

The Add Filter button will add another row to the, "Apply These Additional Filters In Building Cumulative Total" grid (shown above). We used this button to add a second condition row to example shown above so that we could specify that the Stimulus must be 17AC.

Select Codes Button

The Select Codes button will open a menu of all defined codes for the field chosen in the current row of the, "Apply These Additional Filters In Building Cumulative Total" grid (shown above). Here is what it would look like for the Donation Stimulus field of the sample database:



With this dialog you can choose multiple codes, all at once. Just click the Select button to choose the currently highlighted code, then proceed to the next code you wish to include. The Deselect button will turn off a code you mistakenly selected. Selected codes are shown in red. In our example, we only selected the 17AC code, but we could have selected many others. When you have selected all the codes you need, click the Ok button. The selected codes will then be pasted into the, "Codes Or Comment" column of the Additional Filter section of the Total For Range filter.

Edit Codes Button

If you only need one or two codes and know what they are, you can just enter them by clicking on the Edit Codes button without going through the Multi-Code Select menu.

Remove Filter Button

The Remove Filter button will remove the currently highlighted filter row from the, "Apply These Additional Filters In Building Cumulative Total" grid.

Reset Conditions

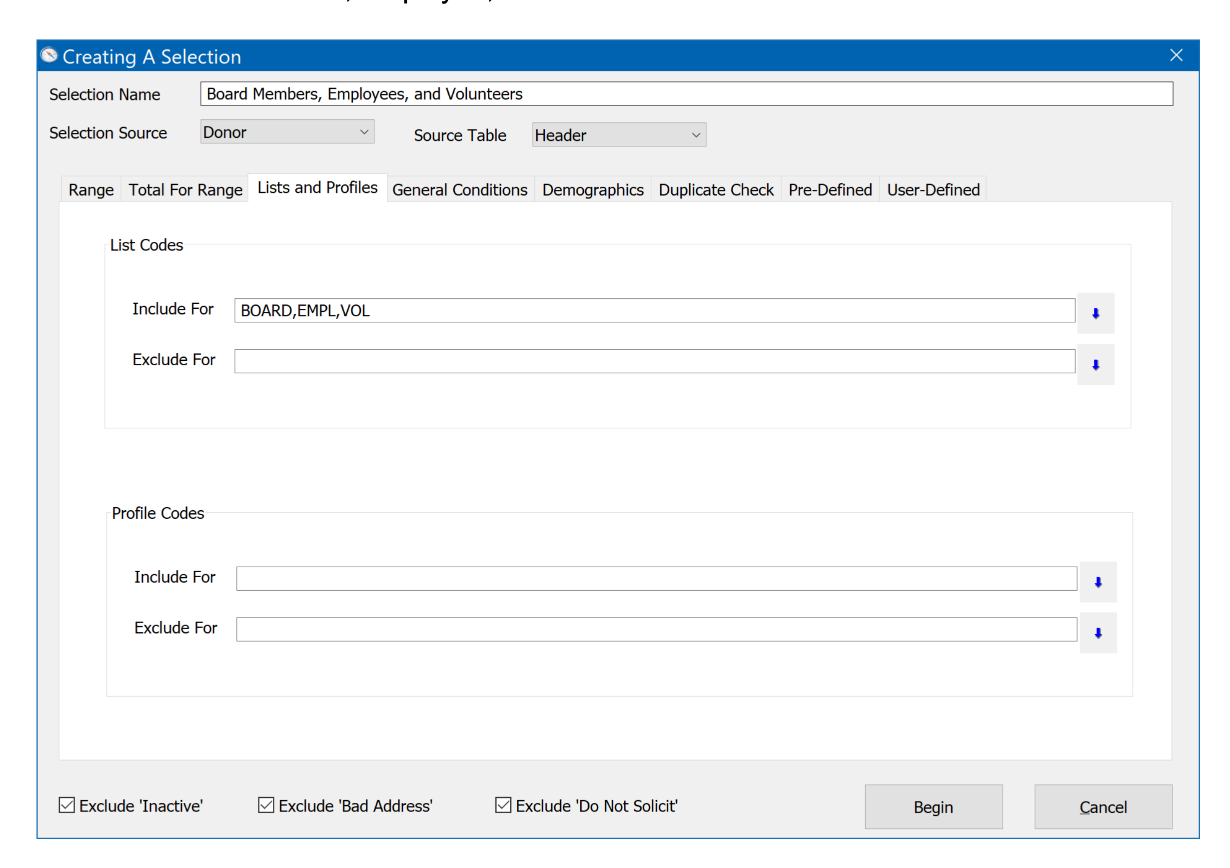
The Reset Conditions button will clear any conditions from the Total For Range selection tab, effectively making it like it is when you begin a new selection. In the reset state, it will have no effect at all on the outcome of your selection.

7.1.3 Specific Lists And Profiles Filter



The Lists and Profiles filter will allow you to create a selection result consisting of donors who are on specific lists, or who have been assigned specific profile codes. For an

explanation of what sort of information is tracked by Lists and Profiles, please refer to the Header Table topic. Here is an example selection in which we are looking for anyone who is on the board member, employee, or volunteer lists:



While the actual List and Profile codes are stored in specific fields such as List1, List2, List3, etc., when using the List and Profile codes filter, you don't have to know which specific List or Profile field a code may have been entered in -- all List or Profile fields are searched automatically. So for the example above, all ten list fields are searched for the codes BOARD, EMPL, and VOL. Also, a person would only have to have one of the three codes to qualify -- they don't have to have all three. So a person who is a board member, but not necessarily an employee or volunteer would still qualify.

There are four entry blanks on the List and Profiles filter -- an Include and Exclude directive for each. While a donor only has to have one of a list of codes in one of the four blanks, multiple codes may be entered. While you may simply type codes if you know what you want, you may also choose them from the Multi-Code Select menu by clicking the down arrow corresponding to each code list entry blank. Use of the Multi-Code menu is covered in the previous subtopic concerning the Total For Range selection tab.

List Codes

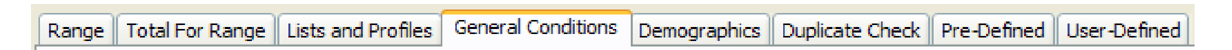
The List Codes group on the Lists and Profiles filter has two options - Include For and Exclude for. The Include For is where you specify the list codes a donor only has to have one of to qualify. The Exclude For is where you specify any list codes which a donor can not be any one of to qualify. You may use both of these together, specifying lists a donor

must be at least one of, and those he may not be any one of to qualify.

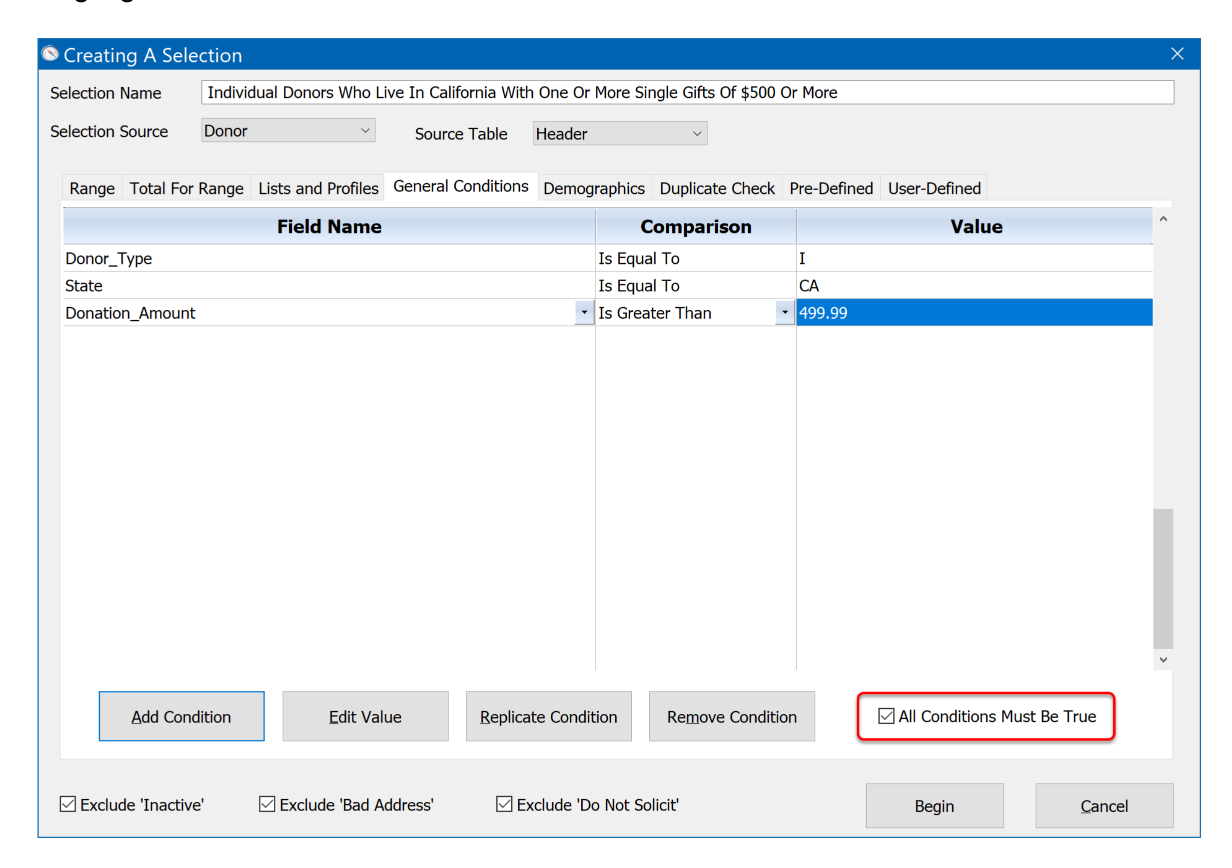
Profile Codes

The Profile Codes group on the Lists and Profiles filter also has two options - Include For and Exclude for. The Include For is where you specify the profile codes a donor only has to have one of to qualify. The Exclude For is where you specify any profile codes which a donor can not be any one of to qualify. You may use both of these together, specifying profiles a donor must be at least one of, and those he may not be any one of in order to qualify for the selection. All of the four include/exclude specifications between list and profile codes must be true -- they are all "ANDed" together.

7.1.4 General Conditions Filter



The General Conditions filter allows you to specify simple comparison conditions for any of the fields of DonorQuest, including any custom fields that you may have created. For example, you could select Individual Donors who live in California, who have one or more single gifts of $500 or more like this:



Each condition of the General Conditions filter has three components:

1. A DonorQuest Field: This can be any field in DonorQuest, including any user-defined

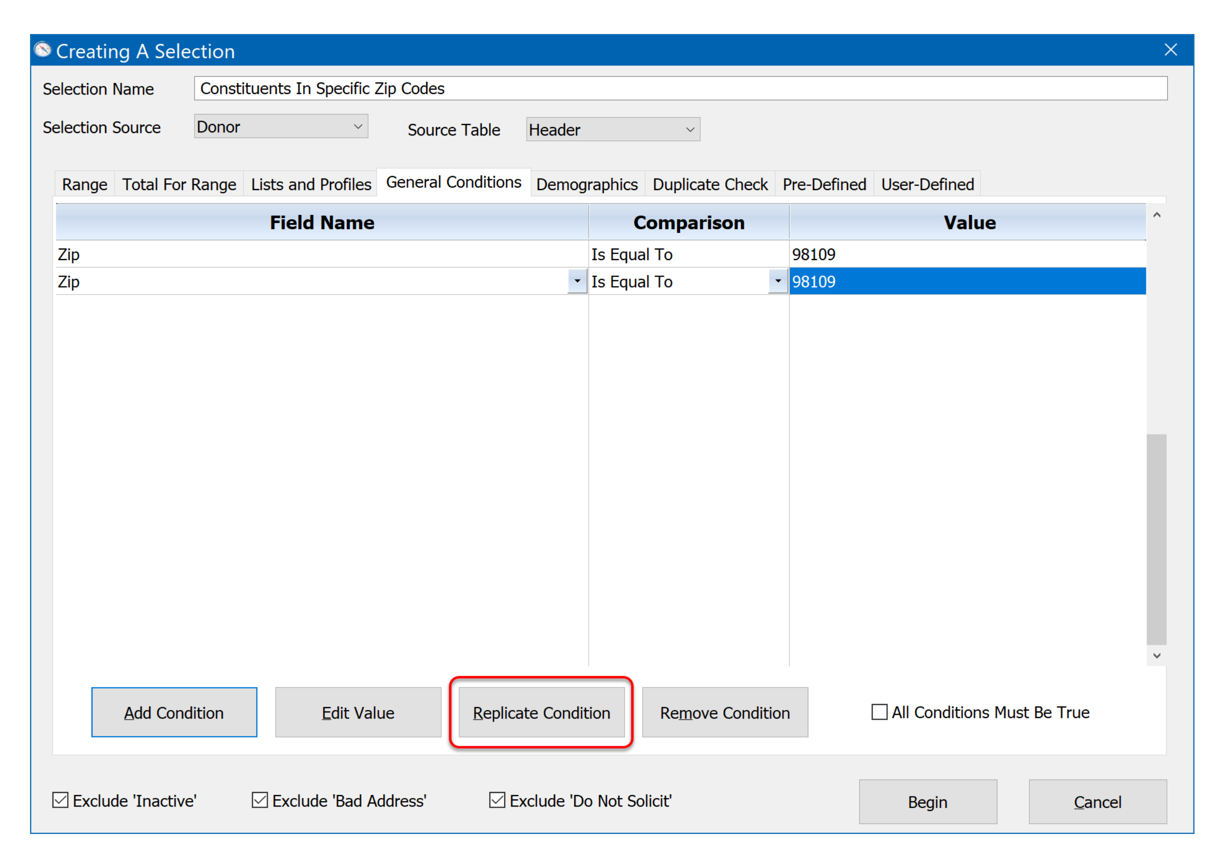
field.
2. A Comparison: This is how the field is to be compared.
3. A Value: This is a specific value the field is to be compared against.

By default only one of the conditions has to be true for the donor to qualify. However, you can specify that they all must be true by clicking the All Conditions Must Be True checkbox, as we did in the example above.

Replicate Condition Button On General Conditions Tab

This is useful when you have a lot of different values you wish to search for in the same field. For example, if you wish to find all of the constituents in a number of specific zip codes, you only have to choose the, "Zip" field and the, "Is Equal To" comparison once, then use the Replicate Condition button to make lots of copies of what would be the same choices were you to use the drop-down menus repeatedly while adding a new condition. You have only then to double-click in the Value space to enter each specific zip code you wish to select constituents for.

You may also order the conditions of the General Conditions tab by clicking on the title of the Field Name, Comparison, or Value columns. When you have a long list of conditions, it is often helpful to order the list by Value, so you can quickly see if you have left out anything you need (such as a specific zip code in a long list of zip codes). Here's what the new dialog looks like:

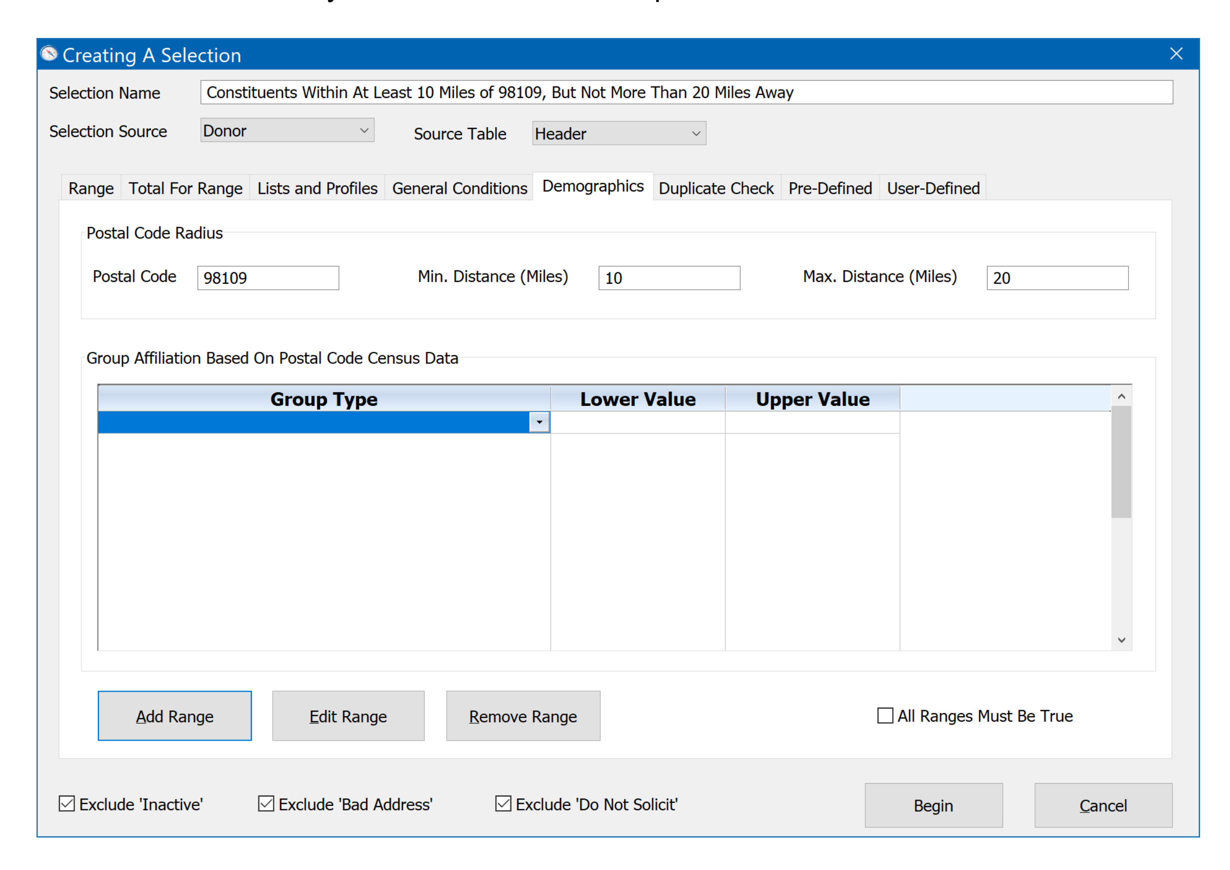


7.1.5 Demographics Filter



The Demographics selection tab in DonorQuest allows you to find constituents based on demographic information publicly available for the zip code in which the constituent lives. You can select constituents based on Zip Code Radius, Ethnicity, Age, Education Level, Median Household Income, Median Per Person Income, Average Home Value, etc. Since the demographic information is zip code based and statistical in nature, it does not violate a constituent's privacy.

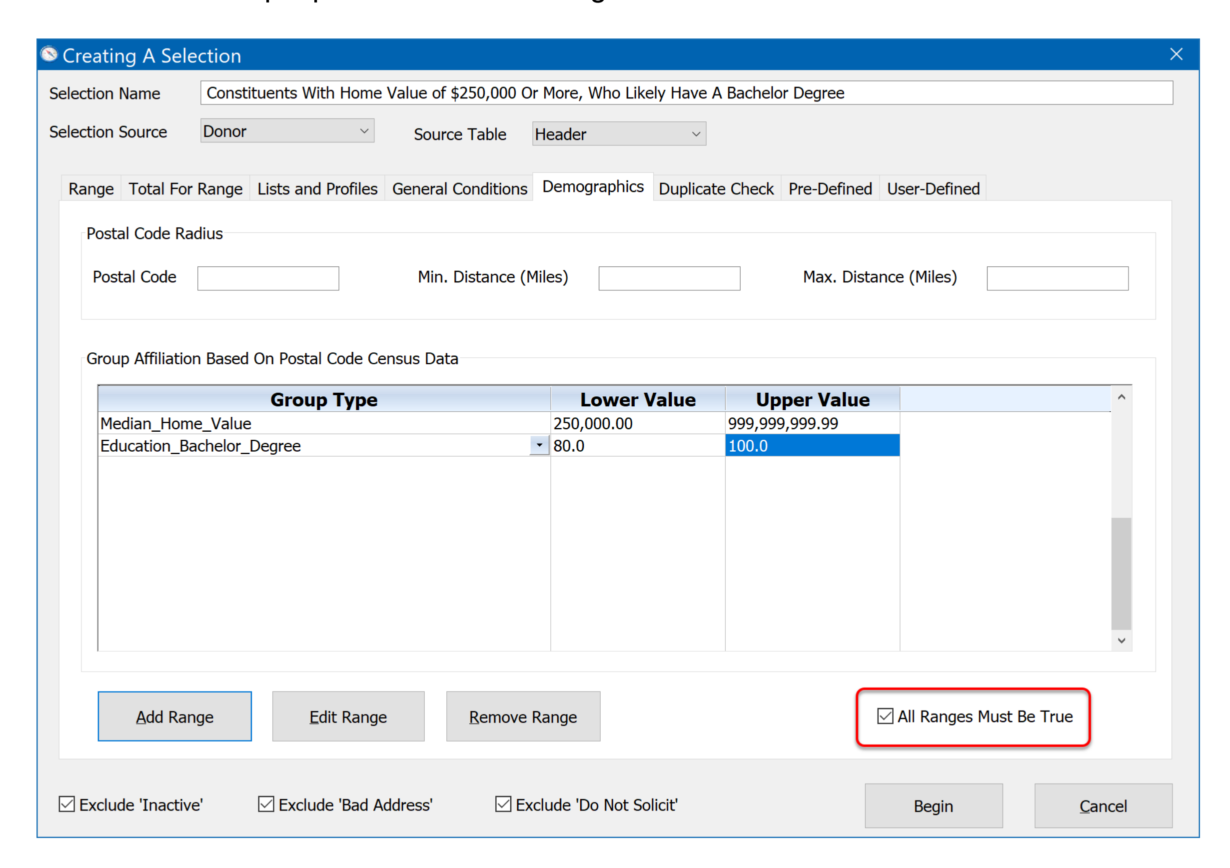
Here is an example of using the Demographics tab to find all of the constituents who live between ten and twenty miles from the center zip code of 98109:



You can think of the above selection as finding constituents in your database who live within a "ring" around a center zip code, with the inner circumference of the ring being 10 miles outside the center zip code, and the outer circumference of the ring being 20 miles outside the center zip code. This may of course be combined with any of the other selection tabs to ask questions such as, "Who has given $500 or more in the past six months, and lives within 15 miles of our main office?"

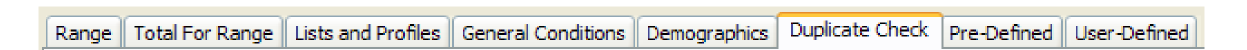
The Group Affiliation demographic conditions are expressed as ranges. The ranges will either be dollar amounts (for home values, median incomes, etc.) or percentages. When they are percentages, the percentage refers to the percentage of people within the constituent's zip code who have a particular attribute. Following is an example of how to

select all the constituents with home values of $250,000 or more, who live in a zip code for which 80% of the people have Bachelor Degrees:



Note that this is not a guarantee that the selected constituents have Bachelor Degrees, but there's an 80% chance they do based on the zip code they live in. Likewise, there is no guarantee the value of their home is $250,000 or more, but it is likely given the median home value for the zip code in which they live.

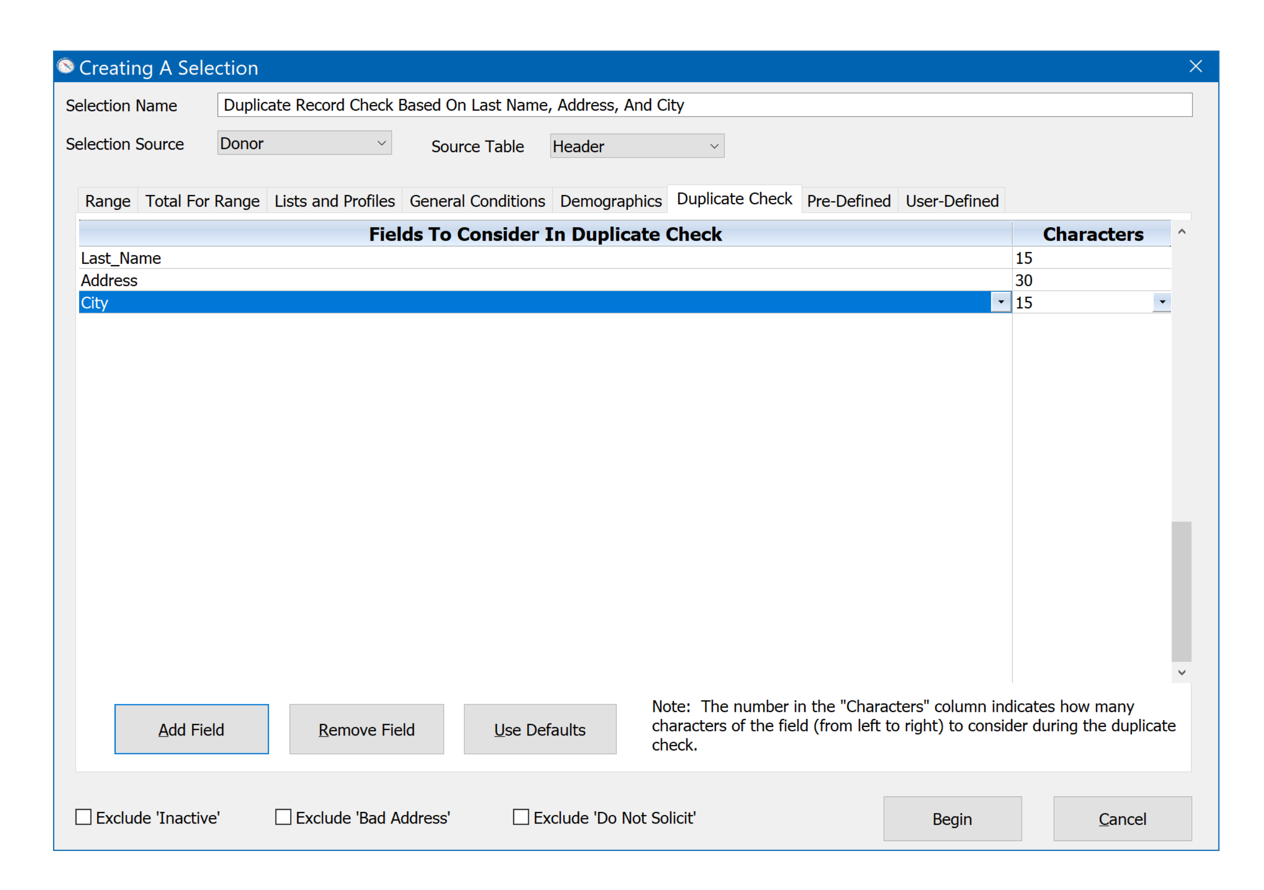
7.1.6 Duplicate Check Filter



Although DonorQuest is designed to prevent duplicate donor entries from happening during data entry, it is still possible that there may be duplicate records within the database. This is especially true if you have imported data from another database. A duplicate record check facility is an essential feature of fundraising software, since sending multiple copies of a mailing to the same individual wastes your money, and can lower the confidence a donor has in your organization's ability to spend money wisely.

The duplicate record selection provides a very flexible way of checking for duplicate donors. The check for duplicate donor records basically consists of comparing donor records by specific fields. These fields are chosen by you. You may use any combination of fields, both pre-defined and user-defined. In addition, you can specify the number of characters from left-to-right to consider for each field you are including in the comparison.

Here is an example of a typical duplicate record check based on the Last Name, Address, and City fields:



Notice that we only consider the first ten characters of the Last Name. This reduces the chance that a misspelled Last Name will cause a duplicate record to be missed. Also, looking at only the first four characters of the Address concentrates on the number part of the address which generally comes first. This avoids having to worry about all the variations in street abbreviations and spelling errors (though it should be noted that DonorQuest has gotten very good at standardizing addresses internally during the check, expanding abbreviations to full spellings for comparisons, so the problem has certainly been minimized). Lastly we look at the first ten characters of the City. Any one of these considerations by themselves would give a lot of false duplicate detections -- the addresses for a lot of different donors would likely start with the same first four numbers for example. But taken together, these three considerations are unlikely to all be true for different donors.

Adding fields to the comparison or increasing the number of characters per field which are compared will make it less likely that you will get false duplicates in the selection result, but you may also fail to catch some of the real duplicates. In general, the default values work quite well (which you can apply by clicking the Use Defaults button), but you are free to adjust them to best suit your donor data. For example, if you tend to have a lot of post office box addresses in your database, then you may wish to increase the number of address characters to ten or more, since all the addresses starting with "POB" would always match if only the first four characters were considered for each address, and the

last name happened to be blank.

You can also take an entirely different approach if you like -- checking all digits of the main telephone number or all characters of the primary email address for example. This is where you have to take into consideration what information you are typically able to capture for your donors. For example, if you have the main phone number for almost all of your donors, but not the email address, then using the phone number is a better way to go. Feel free to experiment here to see what works best with your data.

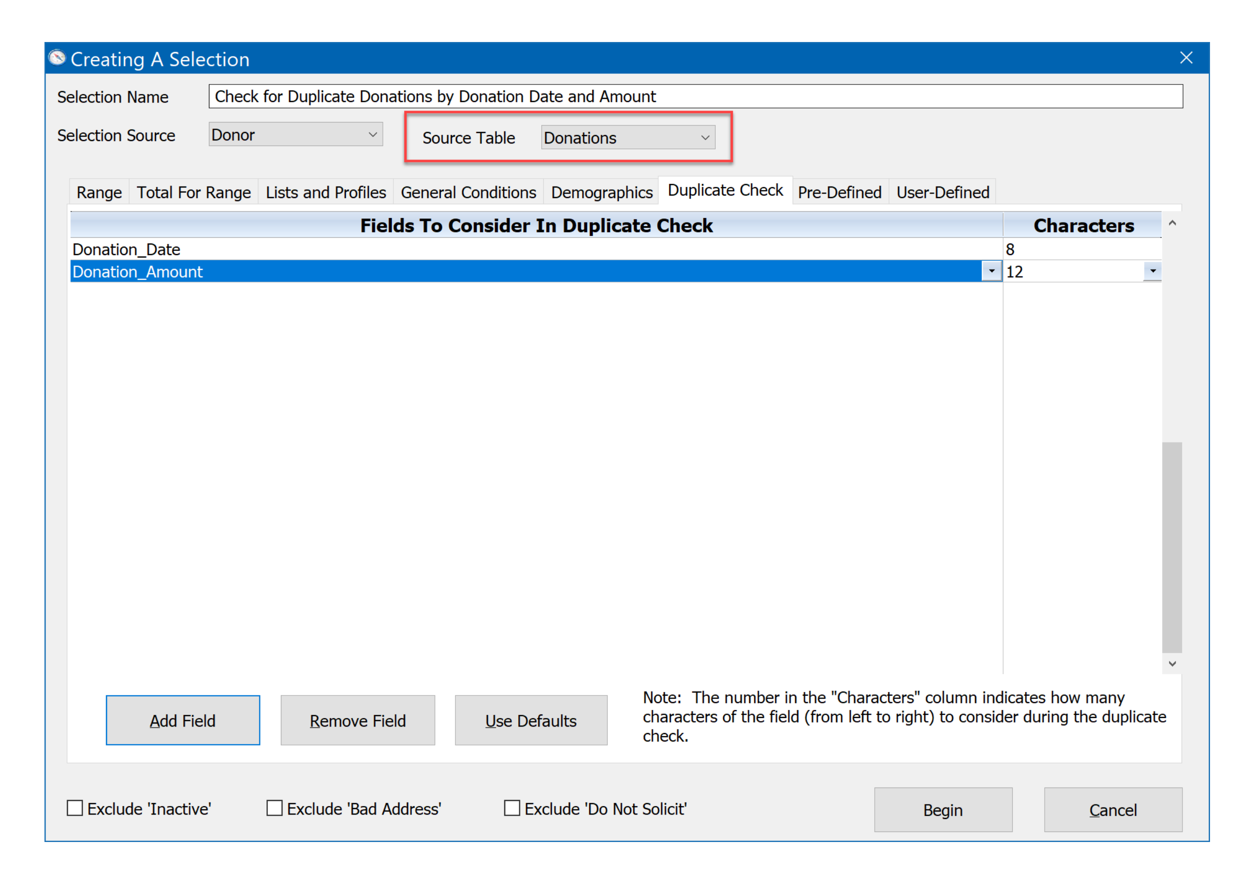
Once you get a duplicate record check selection result, you will typically do two things. First you may choose to simply view the result, ordering it by various fields such as Last Name or Address to see how well your particular mix of fields and character widths worked. If it looks like you got a pretty accurate result with mostly true duplicates, then you might print the selection using the, "Header - Donor Name And Street Address For Duplicate Record Check" report layout which is specifically designed to show duplicate records together by address. You could then review the report with other people in your organization to make a decision about clean-up, possible highlighting the names which you all agree are true duplicates. Finally, you can return to viewing the selection in DonorQuest, and physically consolidate the true duplicates using the DonorQuest Consolidation feature.

Duplicate Record Consolidation

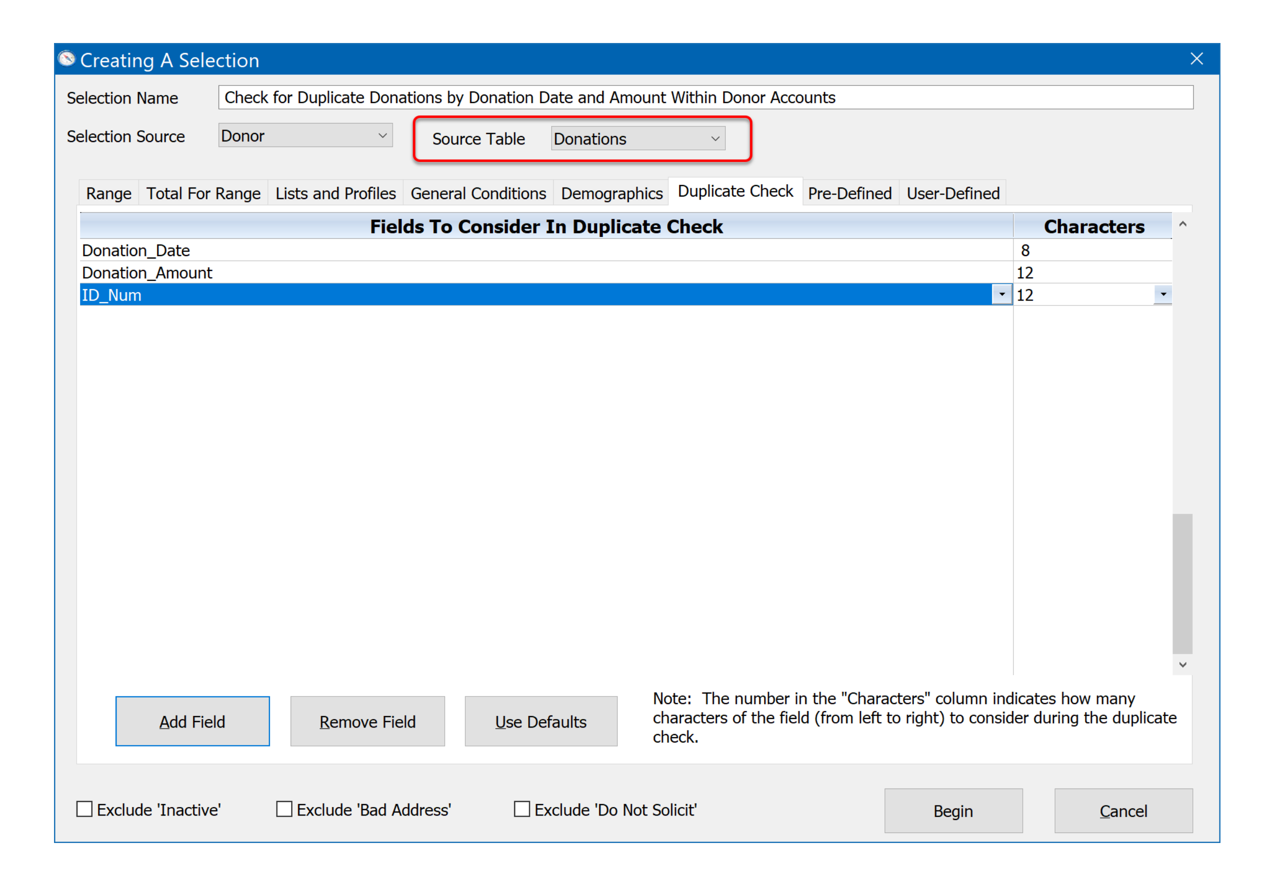
In addition to finding and reporting suspected duplicate donor accounts, DonorQuest allows you to consolidate the histories of duplicate donors. While viewing a selection of suspected duplicate records, you can use the Mark button to mark actual duplicates, then click the Consolidate button. Be sure and mark only the records which apply to a single duplicate donor. For example, if there are three duplicate records which all belong to donor Justin Hayward, you would mark all three, position the cursor on the one of the three that has the most correct information, then click consolidate. Note that all donations, pledges, etc. will all then be copied to the one surviving donor account, and the duplicate records will be deleted. While each donor may have multiple donations, pledges, etc., each donor only has one Header record storing the main biographical information for the donor. So if you find that one of the duplicate records has a piece of biographical information you need to keep -- such as a phone number or email address, you should copy and paste it into the one record that you plan to keep before clicking the Consolidate button. This can be done by moving back and forth between duplicate accounts with the Edit form open, copying and pasting Header field data with the mouse.

Checking For Duplicate Donations, Pledges, Contacts, Etc.

It is also possible to check for duplicate donations, pledges, contacts, etc. either across the entire database, or within donor accounts. As with the check for duplicate donors, you may choose the fields to use in the comparison between records, and how many characters of each field to use in the comparison. For example, you could check for duplicate donations using only the date and amount fields like this:



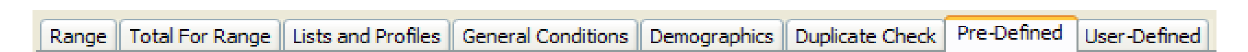
To search for duplicate donations which exist within donor accounts (which can be caused by importing the same list of donations twice), include the Donor ID number in the field to consider like this:



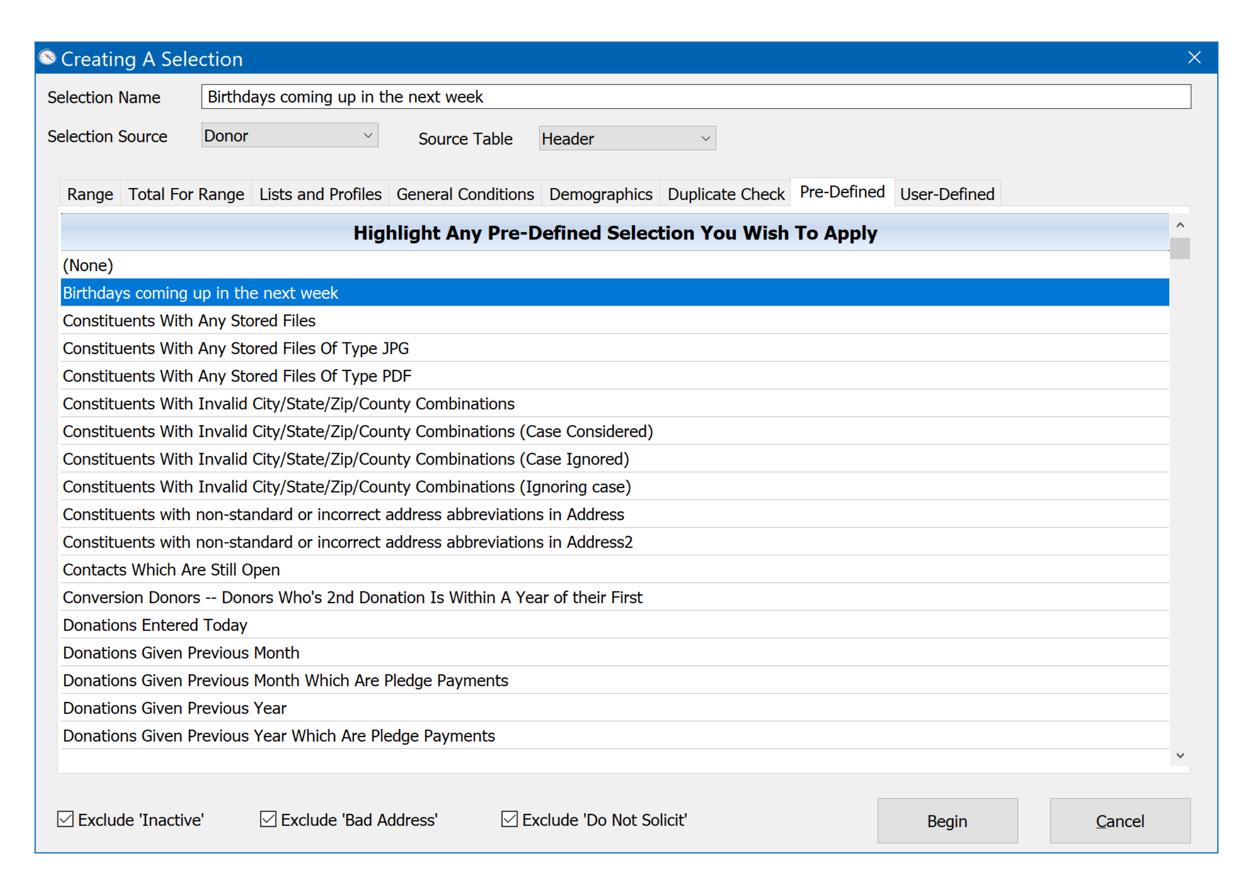
Note that for numeric fields, you should always specify the entire width of the field in the Characters column. This is because numbers are formatted as right-justified character values before they are compared, and you want to compare all digits of any two numeric values.

Also notice that we chose Donations for the Source Table when checking for duplicate donations. If we had left it set at the Header table, then only the most recent donation for each donor would have been considered.

7.1.7 Pre-Defined And User-Defined Filters



Pre-Defined and User-Defined Filters are quite different than the others. All of the other filters such as Range, Totals For Range, etc., all involve you entering values to help define the selection. Pre-Defined and User-Defined filters are self-contained and ready to go, you simply highlight the name of the one you want to use and you're good to go. For example, there is a pre-defined filter called, "Birthdays coming up in the next week." This pre-defined selection already knows it is working with the Primary donor's birthday, and it will select any donors who have a birthday coming up in the next seven days. To apply this pre-defined filter, you would simply highlight it like this:

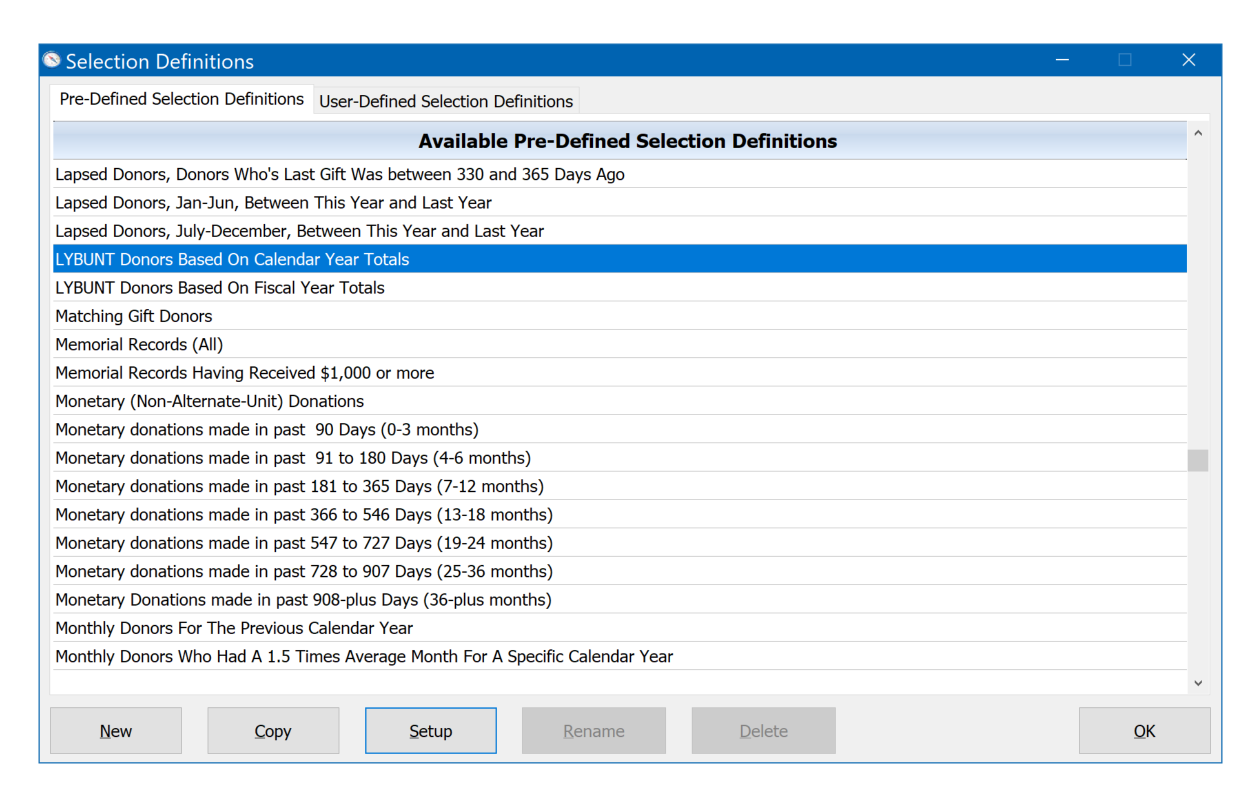


Pre-Defined and User-Defined filters are based on a special DonorQuest query language and can be very simple, or very complex in how they are defined. But when you are simply using them you don't have to worry about how they are defined, you simply use them. But if you are curious, or if you plan to create your own User-Defined selection filters, you can take a look at how the pre-defined filters are defined by clicking on File, Open, Selection Definitions.

User-Defined Selection Filters

While about ninety percent of the queries you will do in DonorQuest can be easily accomplished with the fill-in-the-blank style selections discussed previously, there may be times when you want to take advantage of the query language built into DonorQuest. You can use any of the pre-defined selection filters as templates for creating your own. Once created, your custom selection filters will remain in DonorQuest for others to use. Likewise, DonorQuest support may email you a custom selection filter in response to a special request, which you can import directly to DonorQuest, and run from the User-Defined tab of the Creating A Selection window, without even needing to see how it is defined.

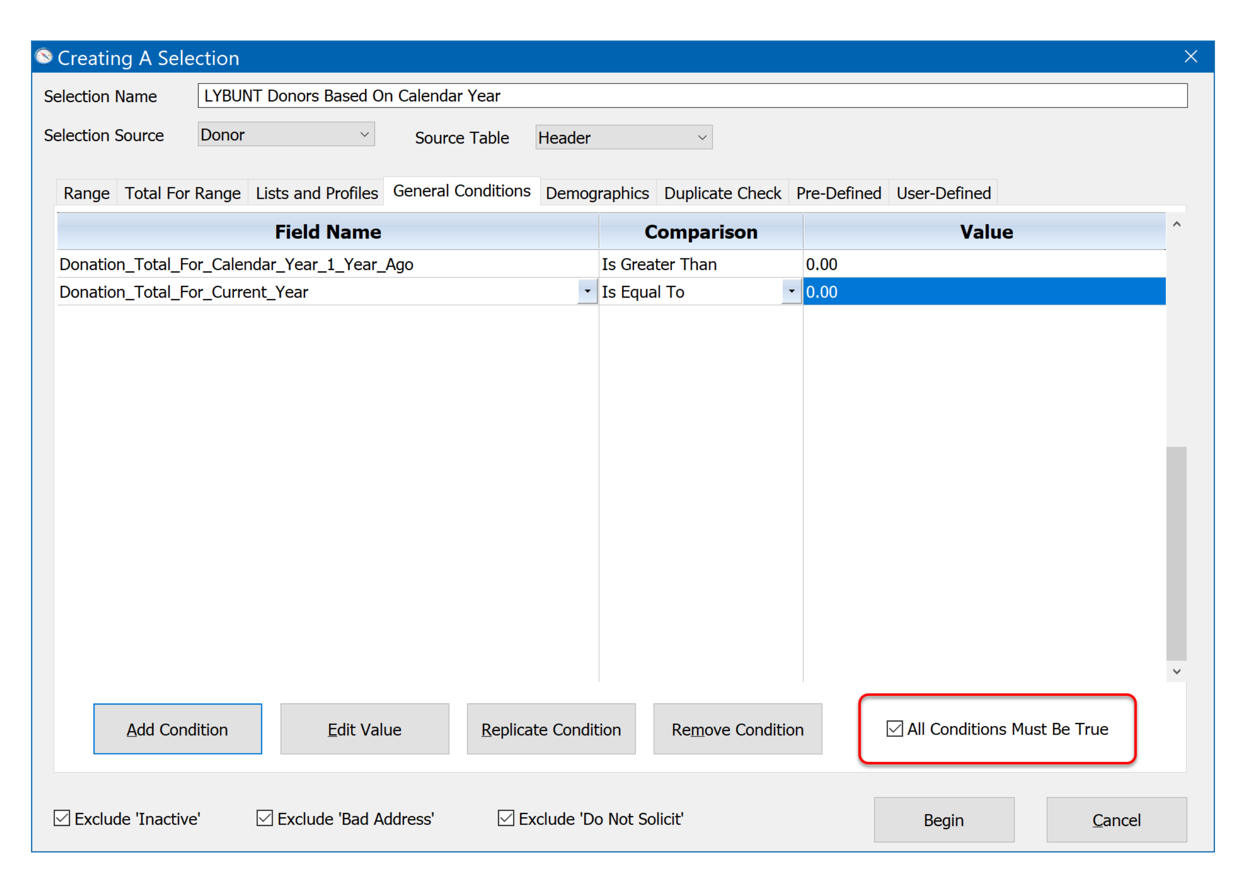
To see language-oriented selection examples, and optionally create your own, click on File, Open, Selection Definitions. You will then see a window with two tabs, the first showing all Pre-Defined Selection Definitions in DonorQuest, and the second showing all User-Defined Selection Definitions created or imported so far for your organization. The window will look similar to this:



As an example, let's take a look at the definition named, "LYBUNT Donors Based On Calendar Year Totals." To see how a selection is defined, highlight it on the menu and click the Setup button. This definition has two simple conditions:

> .Donation_Total_For_Calendar_Year_1_Year_Ago. > 0
> .Donation_Total_For_Current_Year. = 0

A selection definition simply consists of one or more condition lines which must evaluate to true or false. In this case, the definition is saying that to qualify for the selection, a donor must have given something last year, but not this year. Of course you could also accomplish this with fill-in-the-blank-style of selection (such as the General Conditions tab) like this:



But what if we wanted to ask a different question, such as which donors gave more this year than last? There is no easy way to do it just using the standard selections. But with a custom selection, it would be a simple one-line condition:

.Donation_Total_For_Current_Year. > .Donation_Total_For_Calendar_Year_1_Year_Ago.

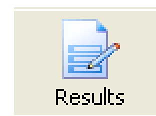
And in addition to literal field names, selection definitions can also make use of the many functions DonorQuest provides. A function can be thought of as a way of translating one value to another. It can be something as simple as checking to see if anyone accidentally entered a Last Name anywhere in the database which starts with a lowercase letter. The following selection condition would find such records:

IsLower(.Last_Name.)

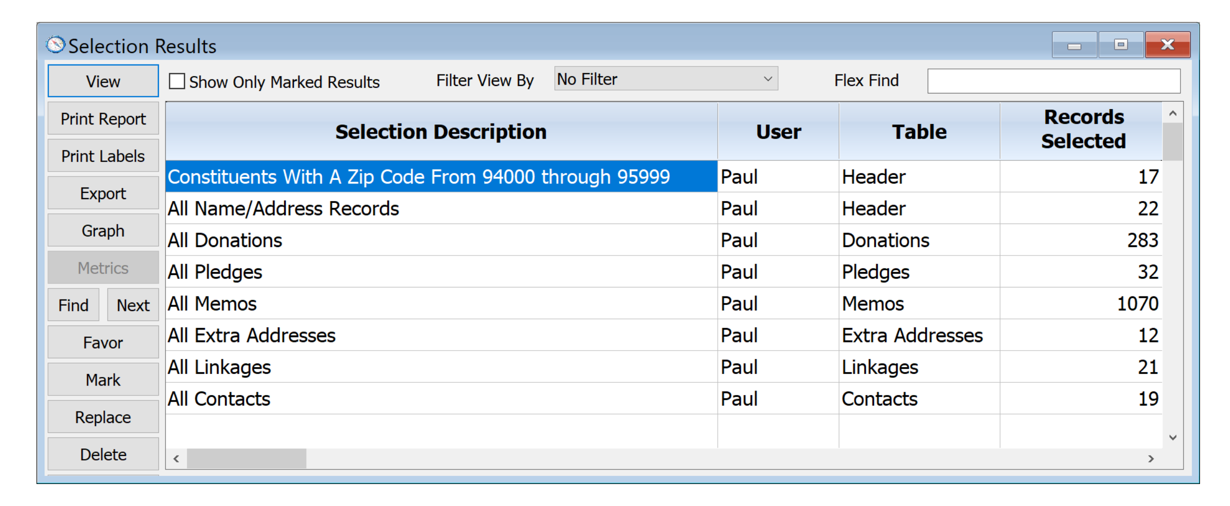
This condition makes use of a built-in function of DonorQuest, IsLower(). The IsLower() function will return True (qualifying a record in a selection), if whatever you give it starts with a lowercase letter. Since a proper last name begins with an uppercase letter, the IsLower() function would only return true and qualify the problem records for the selection so we can take a look at them. At that point we could even use the selection result to apply a mass correction, setting the first letter of the last name field for the qualifying records to uppercase, all without manually correcting the records one at a time.

Again about ninety percent of your selections will be standard fill-in-the-blank style selections (such as the Range, Total For Range, etc.), but there are times when the free-form language-oriented power of the query engine in DonorQuest can really shine.

7.2 Working With Selection Results



Once you have created a new selection, it along with all others are kept for future reference and manipulation. You may, at any time, return to the Selection Results window by clicking the Results button on the DonorQuest toolbar. When you do this, the Selection Results window will appear. This is the same window that you are automatically taken to upon completing a new selection:

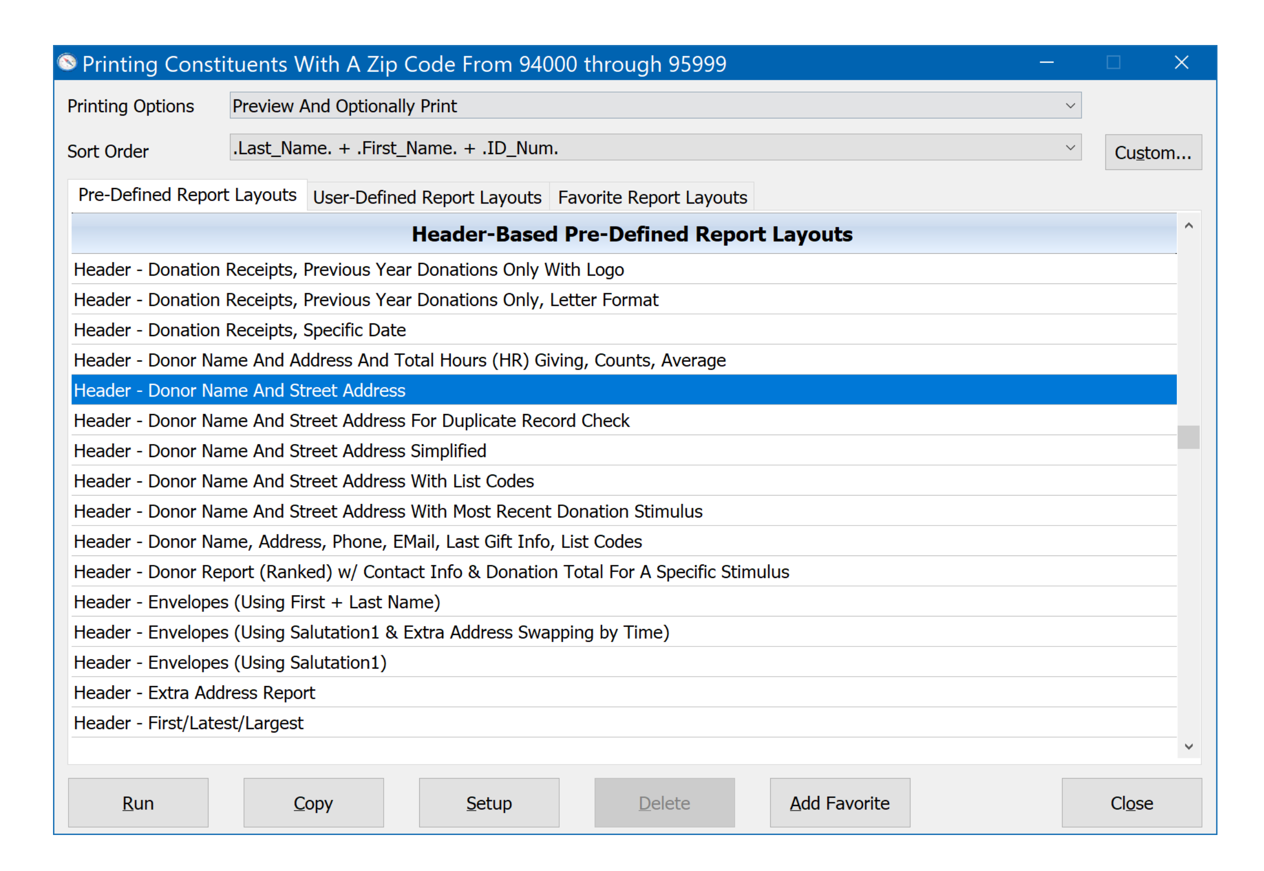


At this point, you may do a number of other things with the existing selection results. The subtopics which follow will explore all of the things you can do with a selection result.

7.2.1 Printing Reports

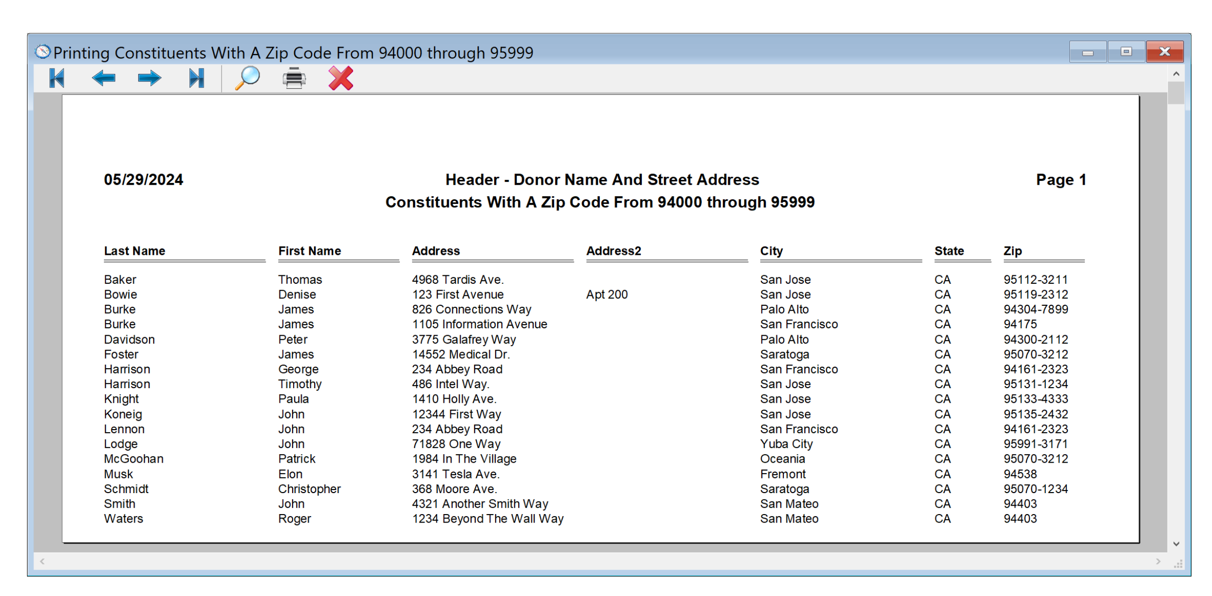
One of the most common things you will do is to print the donor information in your selection result using one of the many standard report layouts supplied DonorQuest (or a custom one you or someone else in your organization may have created). As an example, let's print the zip code selection we created in the Range Filter topic. Proceed as follows:

1. Open the Selection Results window by clicking on the Results button on the DonorQuest toolbar.
2. Highlight the example we created, "Constituents With a Zip Code From 94000 Through 95999"
3. Click the Print Report button. You will see the DonorQuest report menu open like this:



Notice how the title for the report window includes the description of the selection we are printing. It is at this point that we are making a connection between the existing selection, and a report layout. Selections filter data, reports show data.

4. Scroll down the list of report layouts and highlight, "Header - Donor Name And Street Address."
5. Be sure the Printing Options control is set to Preview And Optionally Print and click Begin. You should see a report preview like this:



05/29/2024 **Header - Donor Name And Street Address** Page 1

Constituents With A Zip Code From 94000 through 95999

Last Name	First Name	Address	Address2	City	State	Zip
Baker	Thomas	4968 Tardis Ave.		San Jose	CA	95112-3211
Bowie	Denise	123 First Avenue	Apt 200	San Jose	CA	95119-2312
Burke	James	826 Connections Way		Palo Alto	CA	94304-7899
Burke	James	1105 Information Avenue		San Francisco	CA	94175
Davidson	Peter	3775 Galafrey Way		Palo Alto	CA	94300-2112
Foster	James	14552 Medical Dr.		Saratoga	CA	95070-3212
Harrison	George	234 Abbey Road		San Francisco	CA	94161-2323
Harrison	Timothy	486 Intel Way.		San Jose	CA	95131-1234
Knight	Paula	1410 Holly Ave.		San Jose	CA	95133-4333
Koneig	John	12344 First Way		San Jose	CA	95135-2432
Lennon	John	234 Abbey Road		San Francisco	CA	94161-2323
Lodge	John	71828 One Way		Yuba City	CA	95991-3171
McGoohan	Patrick	1984 In The Village		Oceania	CA	95070-3212
Musk	Elon	3141 Tesla Ave.		Fremont	CA	94538
Schmidt	Christopher	368 Moore Ave.		Saratoga	CA	95070-1234
Smith	John	4321 Another Smith Way		San Mateo	CA	94403
Waters	Roger	1234 Beyond The Wall Way		San Mateo	CA	94403

Notice that the report is ordered by Last Name. We could have ordered it differently by one of the other pre-defined orders in the Report window by clicking on the drop-down list next to Sort Order, or we may have ordered it by a custom order using any combination of fields by clicking on the Custom button to the right of the Sort Order options.

When the preview is displayed, you may click on the printer icon to print the current page, a range of pages, or all pages. If the report only has one page (as is the case in our example), clicking the printer icon will immediately print the single page.

7.2.2 Printing Labels

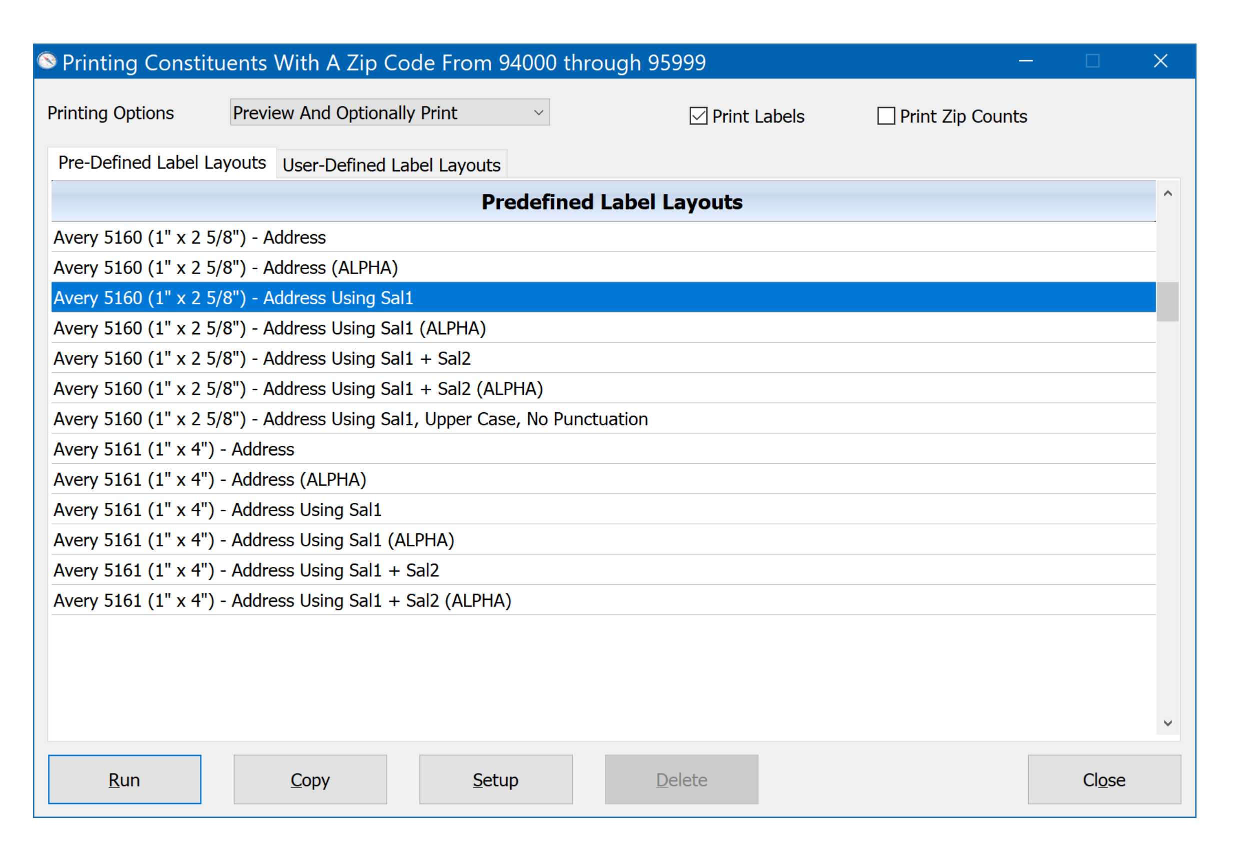
In addition to standard report layouts, DonorQuest also provides label formats which are chiefly designed for use with mailing labels. DonorQuest provides standard label formats for Avery 5160 and 5161 series labels, and as with report layouts you can also create your own custom label layouts if needed.

As an example, let's print the example zip code selection we created in the Range Filter topic. Proceed as follows:

1. Open the Selection Results window by clicking on the Results button on the DonorQuest toolbar.

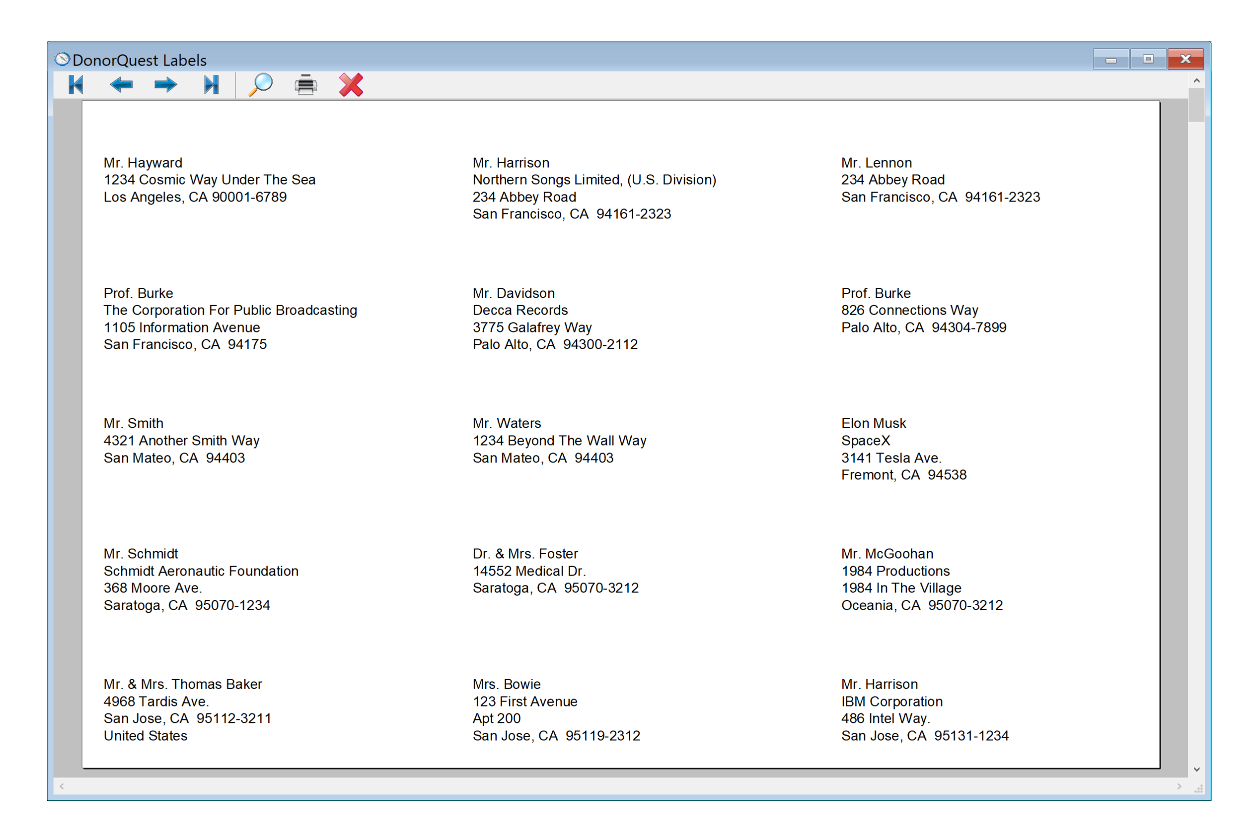
2. Highlight the example selection we created, "Constituents With a Zip Code From 94000 through 95999"

3. Click the Print Label button. You will see the DonorQuest label menu open like this:



4. Highlight the "Avery 5160 (1" x 2 5/8") - Address Using Sal1" label.

5. Be sure the Printing Options control is set to Preview And Optionally Print and click Run. You should see a report preview like this:



As with the report preview, when the label preview is displayed, you may click on the printer icon to print the current page, a range of pages, or all pages. If there is only one page of labels (as is the case in our example), clicking the printer icon will immediately print the single page.

7.2.3 Exporting Data

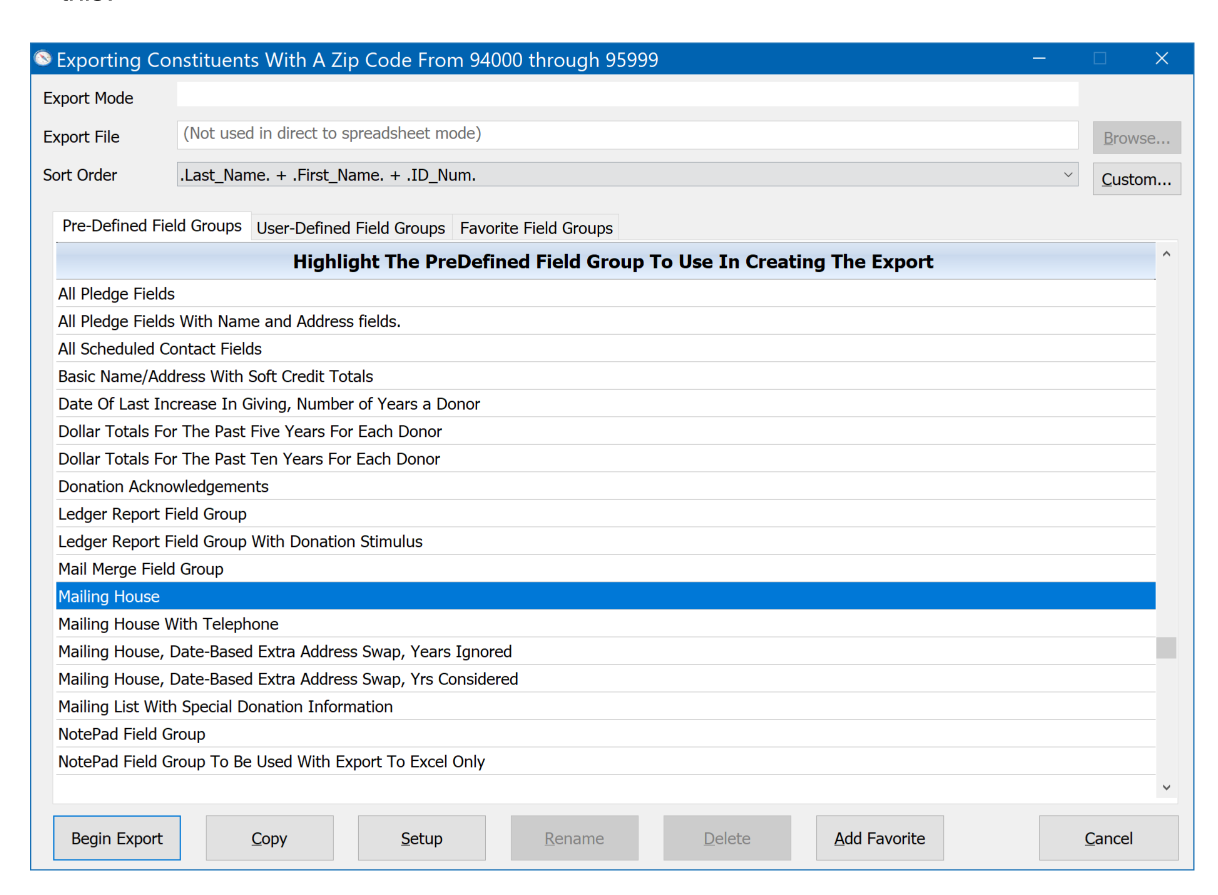
Aside from printing reports from a selection result, another very common thing you will do is to export the donor information in your selection result using one of the many standard field groups supplied with DonorQuest (or a custom one you or someone else in your organization may have created). A field group is like a report layout -- it is a specification of which data fields to include in the output. But instead of created a printed formatted report, the output goes to a standard delimited text file which can be read by other software programs. There is also an option for sending the exported data directly to a new Excel spreadsheet. As an example, let's export the example zip code selection we created in the Range Filter topic. Proceed as follows:

1. Open the Selection Results window by clicking on the Results button on the DonorQuest toolbar.

2. Highlight the example selection we created, "Constituents With a Zip Code From 94000 Through 95999"

3. Click the Export button. You will see the DonorQuest export field group menu open like

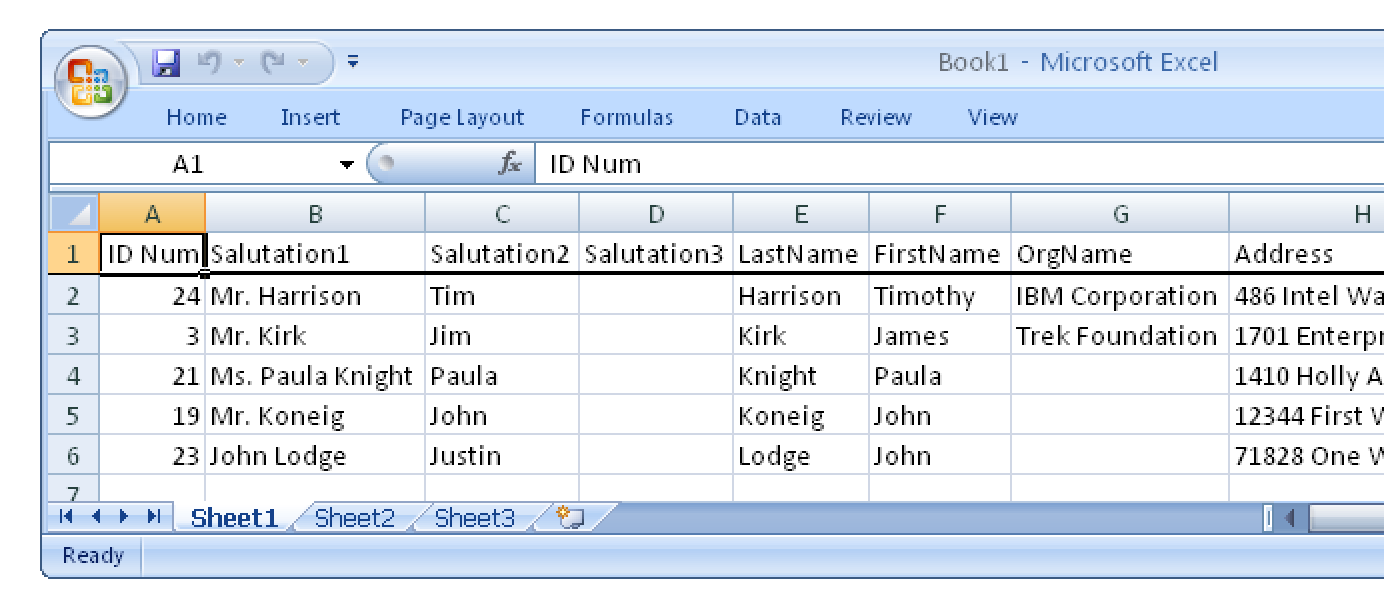
this:



Notice how the title for the export window includes the description of the selection we are exporting. It is at this point that we are making a connection between the existing selection, and a export field group. Selections filter data, exports send it out.

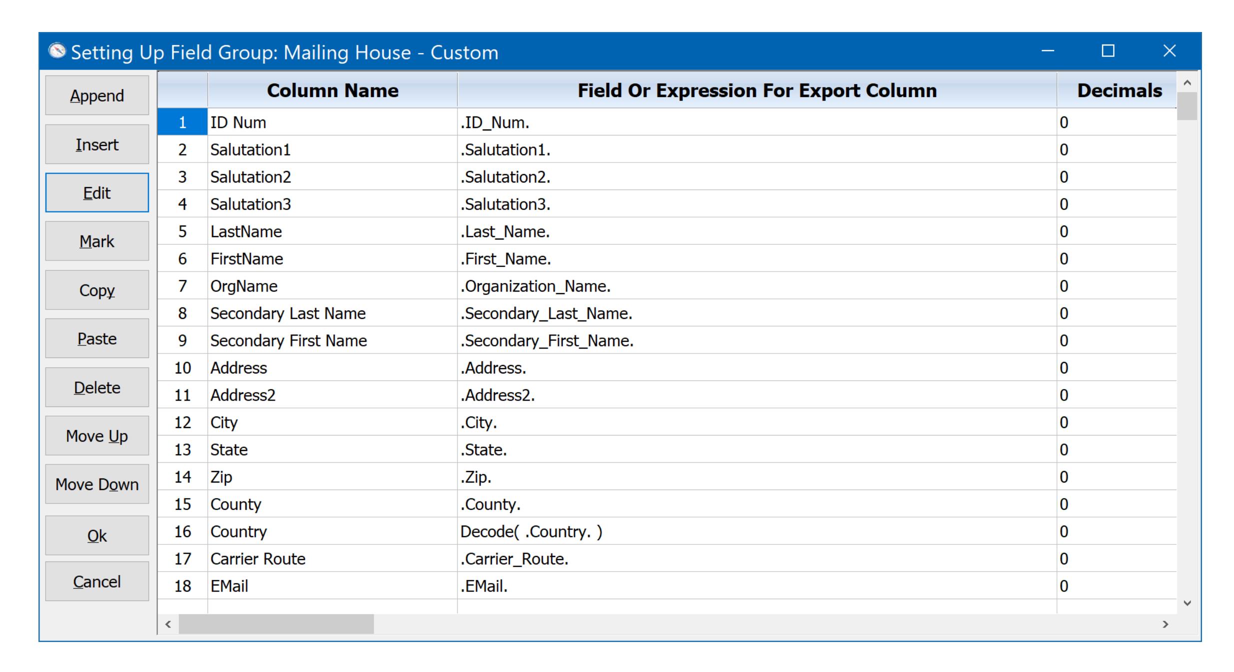
4. Scroll down the list of field groups and highlight, "Mailing House."

5. Be sure the Export Mode is set to Direct To A New Excel Spreadsheet and click Begin. You should see Excel automatically open like this:



While the selection itself controlled which constituent records were exported, the Mailing House field group controlled what about each constituent was exported - which precise data columns were included. If you had chosen a different field group, such as All Header Fields, you would have had the same group of constituents exported to Excel, but you would have had many more data columns -- in fact all of their biographical information.

You can see which columns or fields are included in a specific field group by clicking on the Setup button of the export window. For example, the Mailing House field group has the following fields:

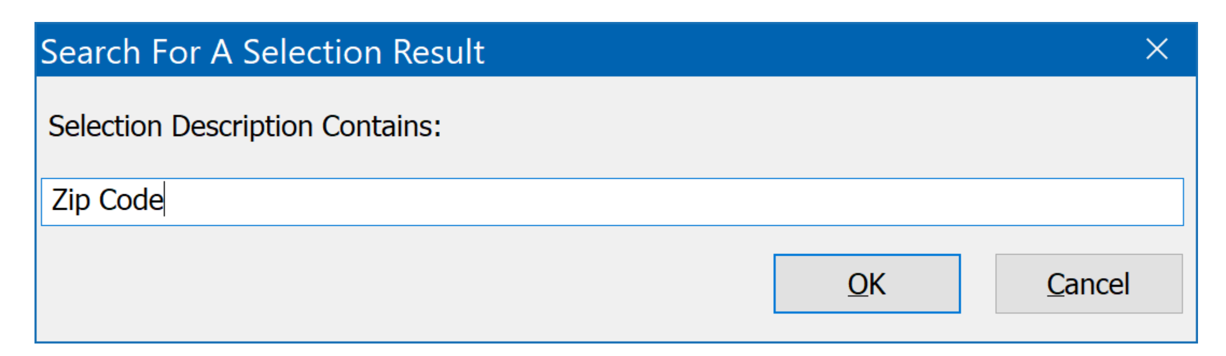


While you can not change the fields in any of the pre-defined field groups included with DonorQuest, you can copy any of the pre-defined field groups, and click on Setup for the copied group and add or delete columns as needed, creating an entirely custom field

group which you and other users in your organization may use repeatedly to export selection results.

7.2.4 Finding Past Results

While in practice you should try and limit the number of selection results your organization has to a few hundred, DonorQuest actually supports having thousands. The Selection Results window may be ordered by any column to help you find past selection results to reuse, but sometimes it is easier to simply search for a past result by name. This can be done by clicking on the Find button of the selection results window, and entering part or all of the name of the result you are looking for. You don't have to enter the exact name of the result you are looking for, normally a keyword is sufficient. For example, if you are looking for a selection named, "Constituents With a Zip Code From 94000 through 95999", you could get by with just entering "Zip Code" like this:

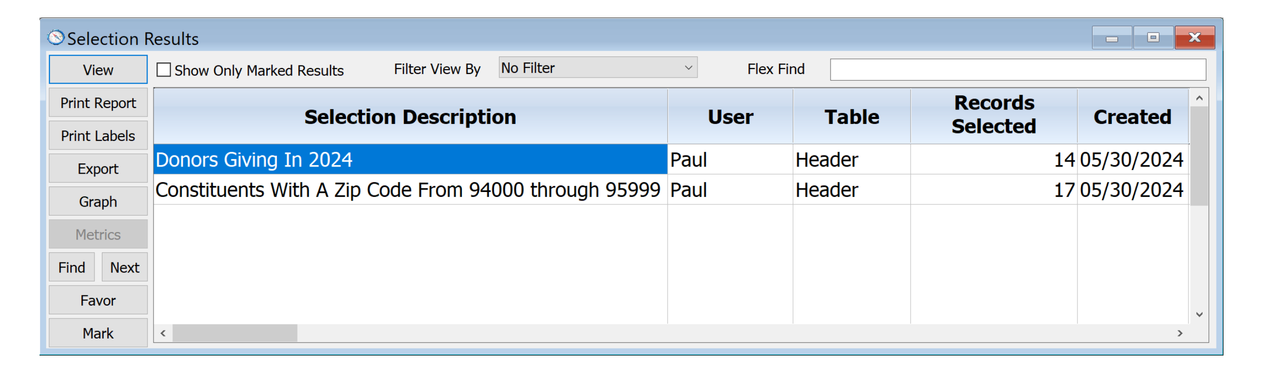


If there is more than one result containing the keywords, you can use the Next button of the Selection Results window to continue on to the next result with a name matching your keywords until you find the result you are looking for.

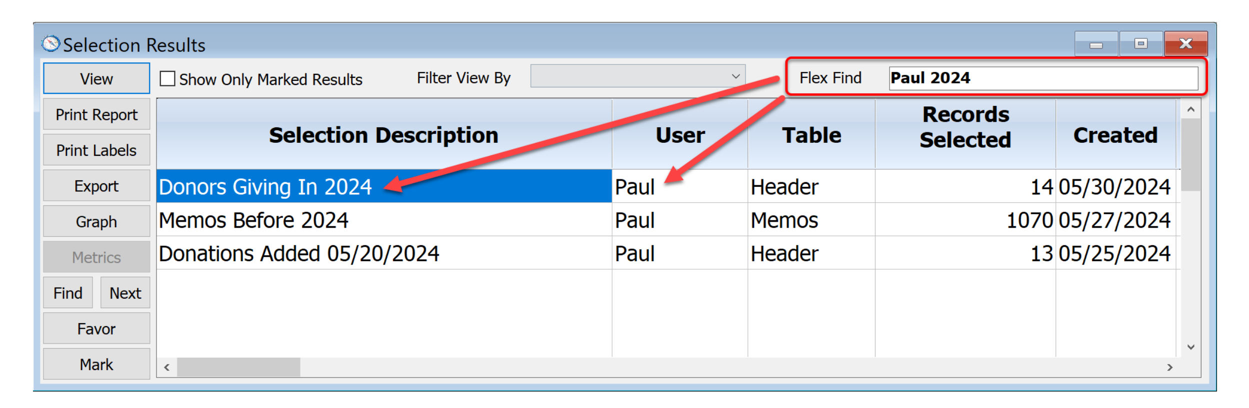
This feature may also be accessed from the main Selections menu, but the buttons are more convenient.

Using Flex Find For Selections

Another way of searching is to type something in the Flex Find blank of the Selection Results window, as shown here:

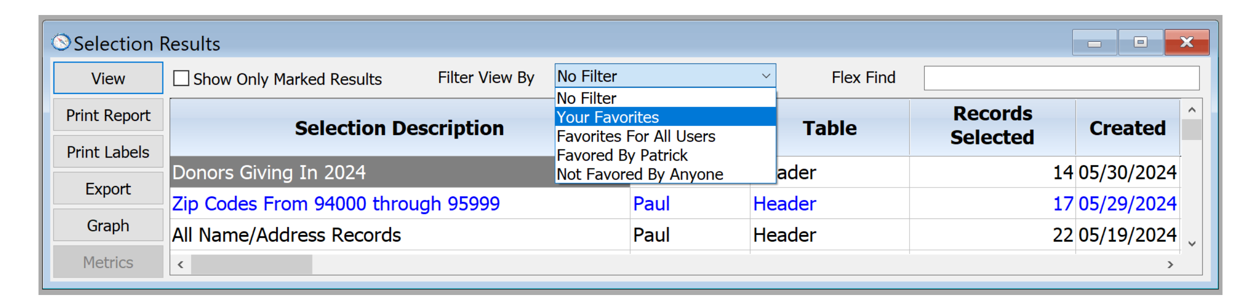


The difference between the Flex Find and the regular Find is that the Flex Find will actually filter the Selection Results window, showing only results which match what you have typed so far. The Flex Find is also very interactive, as it searches while you are typing! It also searches across the Selection Description, User, and Table columns, so you can combine keywords from any of these three columns (the regular Find only searches the Selection Description). For example, if we were to add 2017 to the above search, it would quickly narrow the display down to the one selection result with a reference to both "Paul" and "2017" like this:

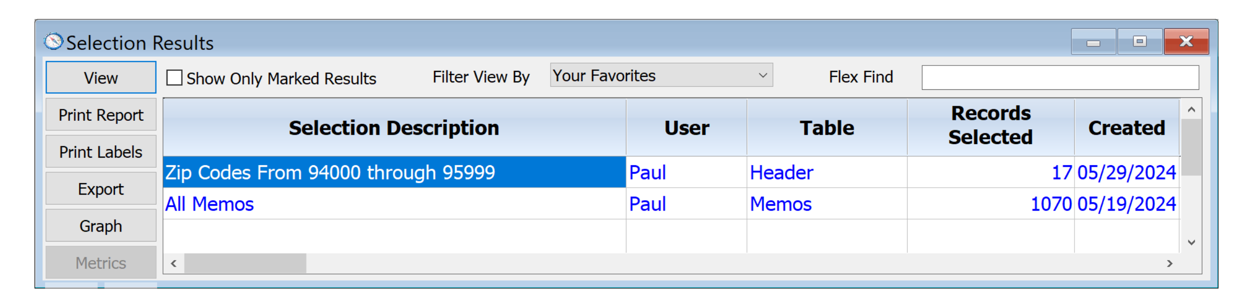


Filter View By

The "Filter View By" option allows you to filter the results which are shown. You may choose to see only your favorite selections, favorites for all users, favorites for a specific user, or all the results not favored by anyone, as shown here:



Here is how the display would look showing, "Your Favorites" when user Paul is logged in:



Show Only Marked Results

The "Show Only Marked Results" checkbox will filter the Selection Results window to just show the results you have marked for manipulation via the Mark button. Note that unlike the Favorites button, the Mark button only marks results temporarily, and the marks are cleared when you close the Selection Results window. All of the filtering actions work together so you can use any or all of them in any combination.

7.2.5 Deleting Past Results

While some selection results you create may be useful in the future and should be kept, most are temporary and should be deleted when you are finished with them to avoid cluttering up the Selection Results window and wasting storage space. While DonorQuest can support thousands of saved selection results, in practice there should never be a need for you to keep more than a few hundred around. For the most part, deleting a selection result is a simple matter - just highlight the result and click the Delete button in the Selection Results window. If you have a lot of selections you want to delete because you are finally getting around to cleaning up old results which no one needs anymore, it is faster to use the Mark button on the Selection Results window to first mark the selections you want to delete, then delete them all at once with the Delete button. If you have a lot of consecutive results you wish to delete, you can mark them in rapid succession by holding down the ALT key on your keyboard, and then also holding down the M key. With these two keys pressed, you should see that DonorQuest begins marking consecutive results in rapid succession. Don't worry about marking too many past where you want to stop - you can also unmark specific results which are marked by highlighting them and pressing the UnMark button. The Alt-M key combination also works for unmarking Selection Results in rapid succession.

Deleting Past Results Which Have Dependencies

The one wrinkle in quickly cleaning up past selection results you no longer need is when some of the results you are trying to delete have dependencies. That is, they were used in the creation of other results by one of the special selection result combining operations. If a selection result has other results which depend on it, those other (more recent) results have to be deleted first. Fortunately DonorQuest has an easy way of identifying the selection results which do not have any subsequent results depending on them so they may be deleted first. In fact, DonorQuest can even automatically mark all such results for you so you can browse through them and keep the markers on the ones which can go. To do this, start by opening the Selection Results window, then click on the Selections menu and choose Mark/Unmark, Mark All With No Dependencies. You will then see all of the Selection Results which have no dependencies automatically turn red to indicate then have been marked. Browse through all of your results and unmark any that you need to keep. When you have finished, click the Delete button to delete the results still marked in red. Since some of the results you delete may have depended on previous results, those previous results may now have no dependencies and could also be deleted. To detect them, run the marking process again. Repeat these steps until you have deleted the results you no longer need.

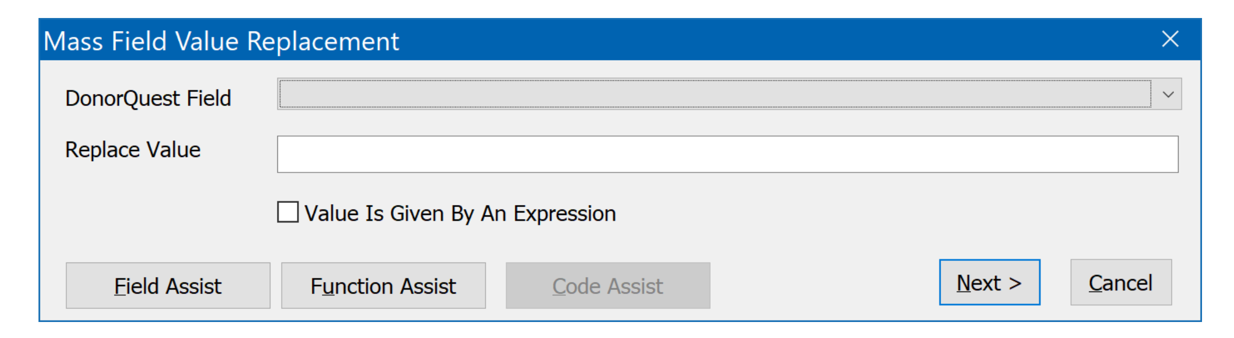
7.2.6 Mass Data Replacement

Performing a Mass Field Value Replacement

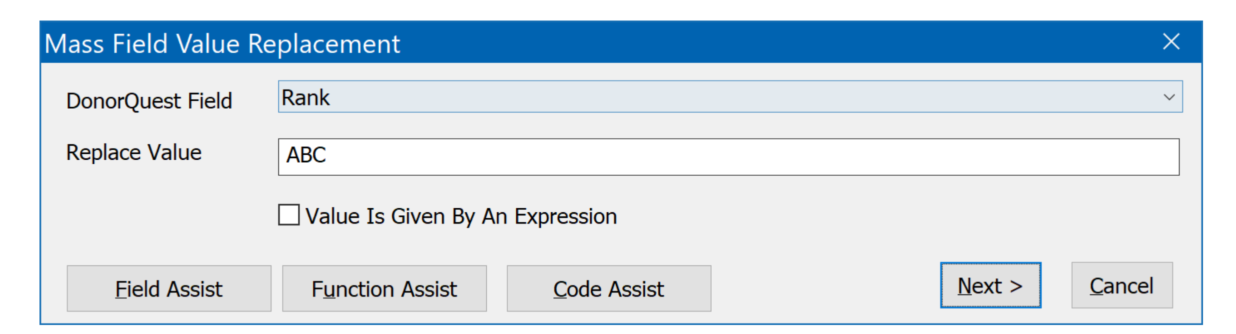
The Replace button of the Selection Results window is a mass field value replacement function. In other words, this feature allows you to make a sweeping change to all of the records in a selection result. This is useful for doing a sweeping change on any value on a donor's record. It's a bit like the search and replace in a word processor, except that the selection itself defines the search part (which records to operate on). The replace part is all that's left to deal with - which DonorQuest field to do the replace in, and what to put in it.

For example, let's say we need to change the value in the Rank field for all donors in a selection to the code ABC. Proceed as follows:

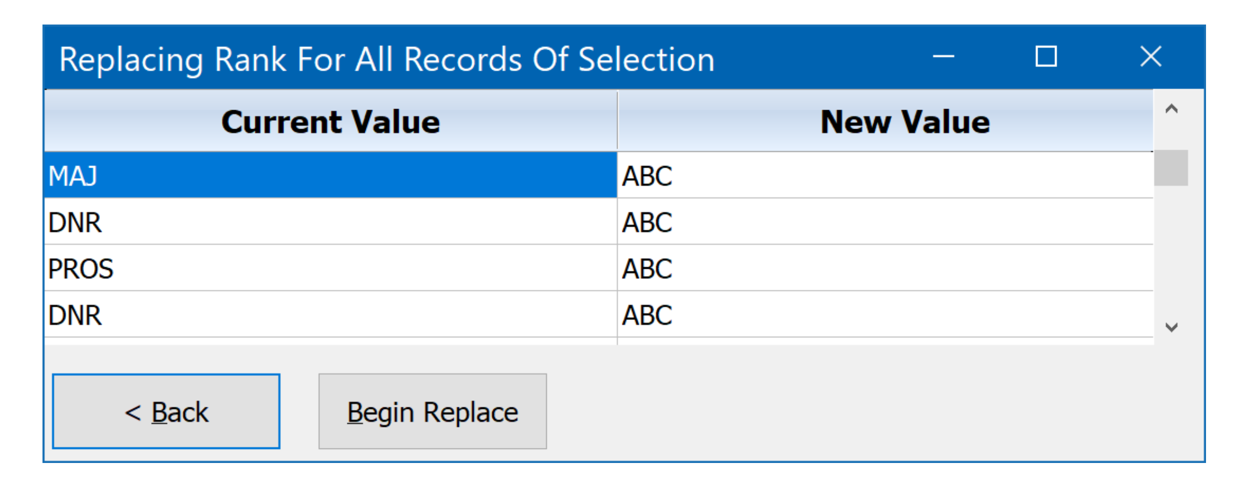
1. Open the Selection Results window by clicking on the Results icon of the toolbar.
2. Highlight the selection you want to do a mass replacement with (you can use any example result).
3. Click the Replace button. You should see:



4. Click on the drop-down list for the DonorQuest Field and choose the Rank field.
5. Enter ABC for the Replace Value. It should look like this:



6. Click the Next> button. You will see a preview of the change you are about to make which will look like this:

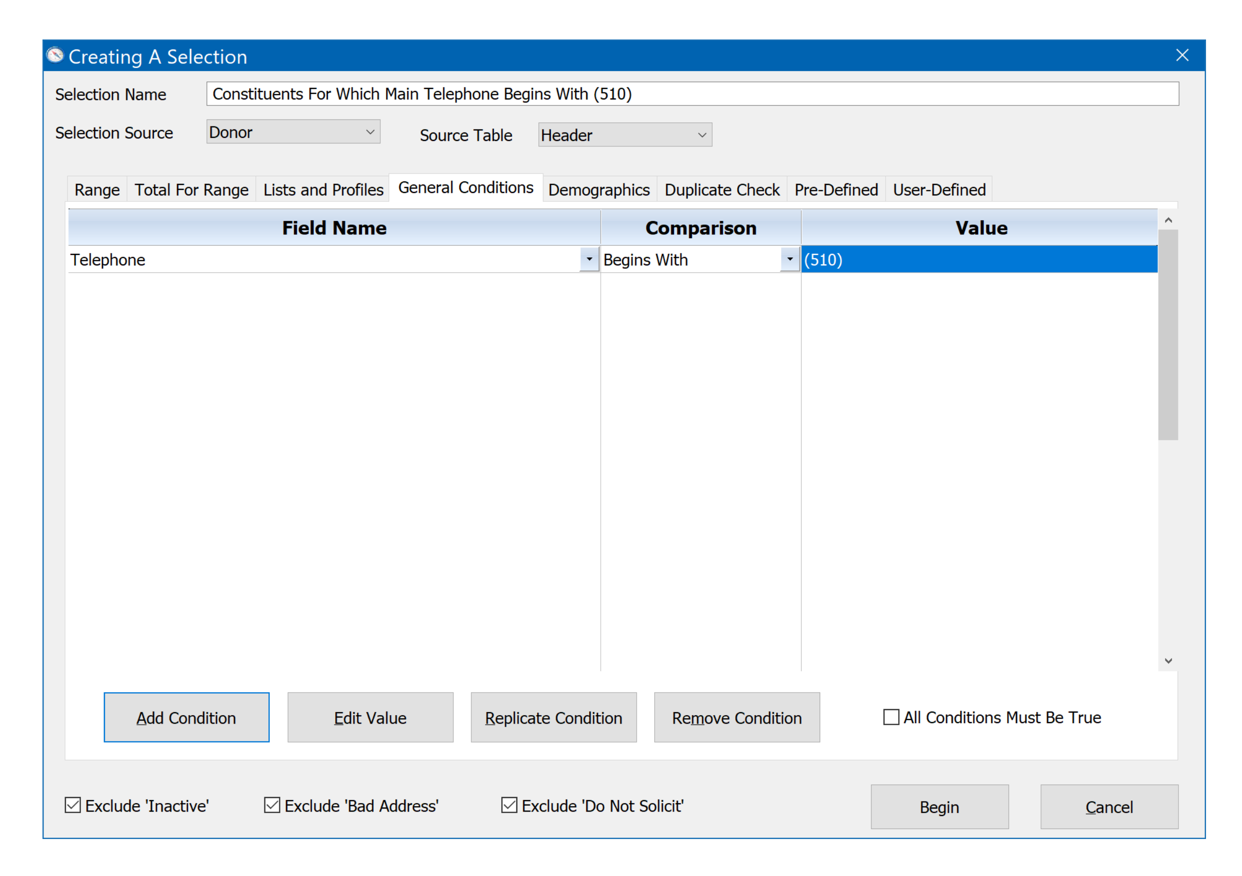


At this point you are only seeing a preview of the proposed mass change, you haven't actually done it yet. If you see that it is not quite right, you can click the <Back button to go back to the previous window and make adjustments. If everything looks right, you can commit the change to the database by clicking the Begin Replace button. Once you do this the changes can not be reversed so take care. It is always a good idea to run a local backup before making any sweeping changes to your database by clicking on System, Run Local Backup.

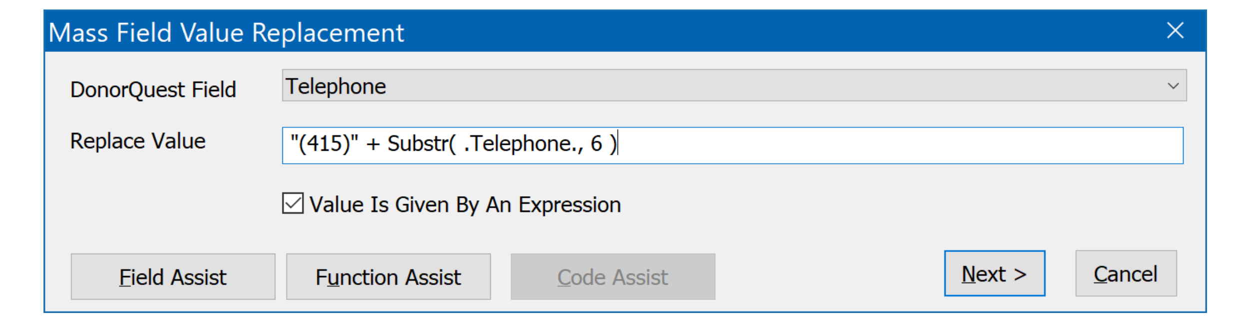
Since DonorQuest supports the use of formulas, you can use the Replace feature to perform activities such as changing the area code for all records of a selection, even though the area code is just part of the telephone field.

Using Replace for an Area Code Change

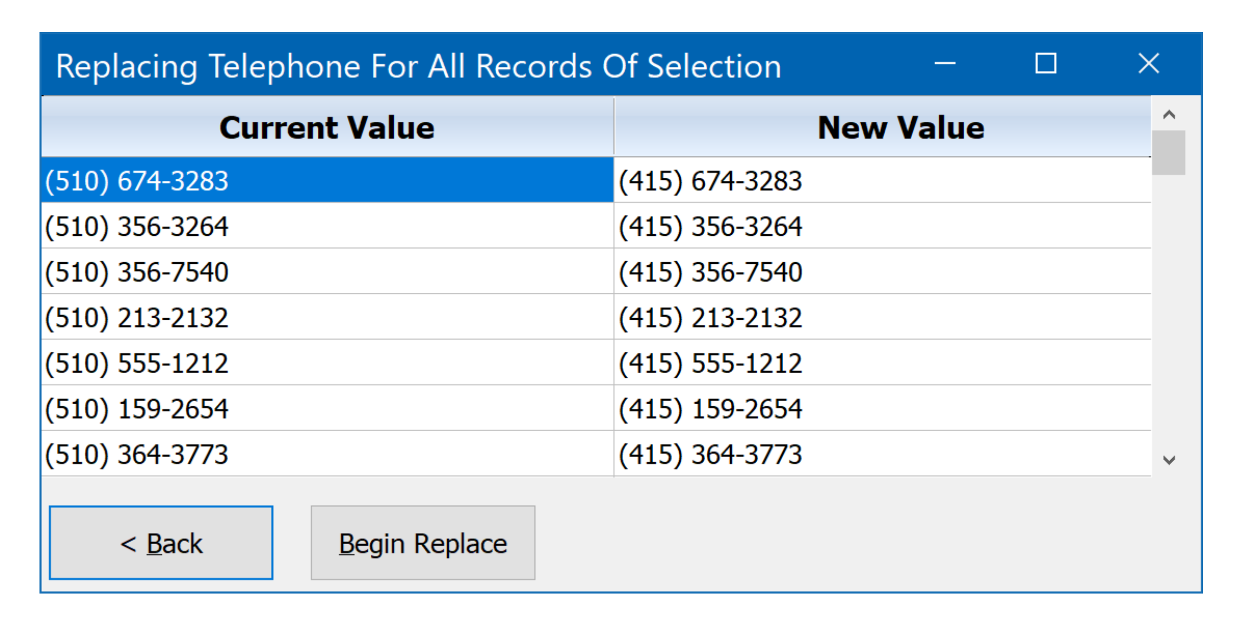
First, you need to perform a selection to get the old area code records into a selection result. Click on the Select button of the DonorQuest toolbar to run a selection for records with the old area code. For example, let's say all the 510 numbers are being changed to 415. You would first run a selection to find all the records with 510 area codes like this:



When you get the result, click on the Replace button of the Selection Results window, and enter the following for the Mass Field Replacement dialog:



Notice that the Value Is Given By An Expression checkbox is checked on. This tells DonorQuest that the Replace Value is a formula, and we want the value of the formula to be placed in the Telephone field for all the records of the selection result. When you click the Next> button, you should see a preview similar to this:

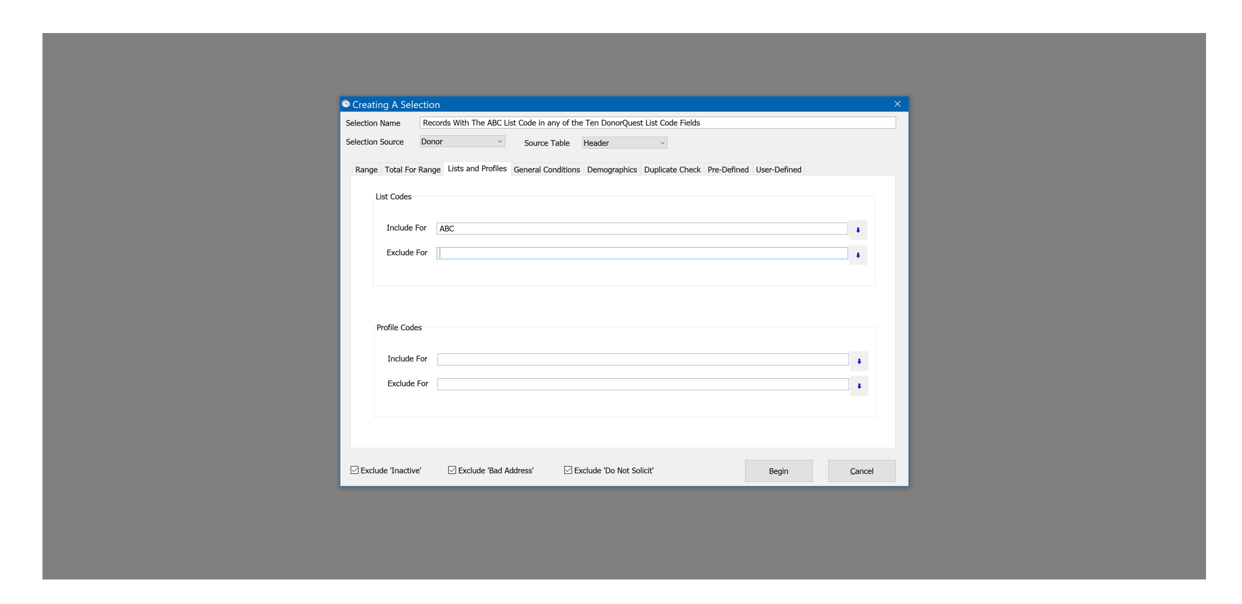


Notice how the formula allowed us to combine the new area code with just the part of the old phone numbers we wanted to keep. The DonorQuest Substr() function was used to extract the desired characters of the old phone number. Substr() is one of many functions available in DonorQuest to manipulate data for reports, exports, custom selections, and mass replacements. All of the available functions in DonorQuest are discussed in the topic on Available Functions.

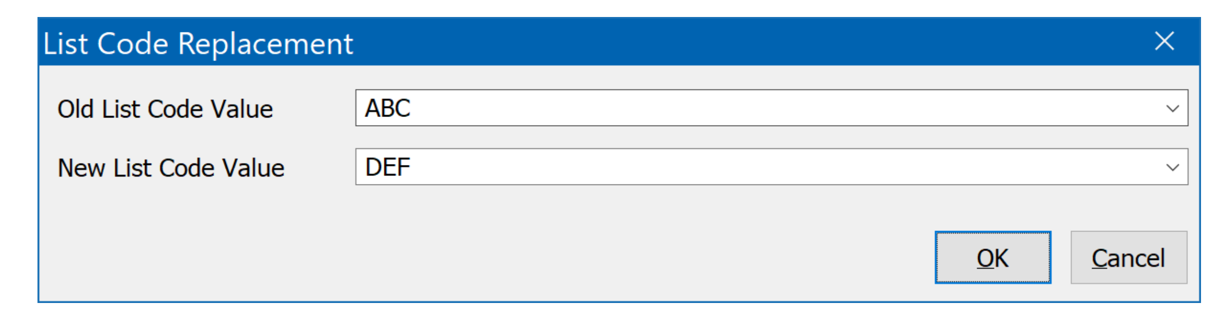
Performing a Mass List Code Replacement

There may be times when you began using a specific list code, only to rethink it and decide on a newer or better code which has the same meaning. While the mass field replacement described above would enable you to search for the old list code and replace it, you would have to do the operation ten times -- once for each of the ten list code fields in DonorQuest. The Mass List Code Replacement feature allows you to do just one replacement action which will search for the old code and replace it across all ten list fields.

As an example, let's say we have an old list code ABC that we need to search and replace to be DEF. We would first run a simple selection to find all the records with ABC in one of the ten list fields using the List Code selection filter, like this:



When we get the result, we would click on Selections, Mass Data Operations Via, List Code Replacement. The List Code Replacement window will open, and we will enter:



Clicking OK will display a confirmation message and after confirming the replacement will be complete.

7.2.7 Mass Data Deletion

There may be times when you will want delete multiple records via a selection result. These records may be specific donation, pledge, memo, etc. records, or if the source table for the selection was the Header table, the records would be entire donor accounts. So this feature should be used with great caution and normally only for very surgical removal of data. You can delete all of the records referenced by a selection result by first opening the Selection Result window (by clicking on the Results icon of the DonorQuest toolbar), highlighting the selection, then clicking Selections, Mass Data Operations Via, Mass Data Deletion Via. If the source table of the selection is the Header table, you will be deleting entire donor accounts with this action so you will have to go through multiple confirmation prompts.

Note that the Delete button on the Selection Results window does not delete donor data, it simply removes the selection result.

7.2.8 Refreshing And Rebuilding



Since select results in DonorQuest are references to the data records upon which they are based and not copies of the records, they have the advantage of always representing the records in their current state including all data entry updates. For example, if you run a zip code selection for zip codes between 95120 and 97200 and you decide to keep the result for repeated use, you can be assured that when using the selection at a later time to print a report, mailing labels, or do a data export, any address corrections (or indeed any changes at all) made in the database since you ran the selection will always be automatically reflected in the selection result. However, while all records in a result will always reflect current data, DonorQuest will not automatically add or remove records in an existing result. This is because you may have manually removed records from the selection, or have other reasons why you want the actual records originally selected to remain.

So, in our example, if the address of a donor who has a zip code of 95120 was updated such that the donor now has a 94538 zip code, the data entry change will carry through were you to use the selection as-is and any labels or reports you print will have the updated address - including the updated zip code. However, the donor really no longer qualifies to be in the selection because their zip code is now outside the range of 95120 to 97200 used to create the selection. DonorQuest provides two features to deal with this, the Refresh and Rebuild options.

Refreshing A Selection Result

Refreshing an existing selection result will examine all records which have been add or edited in any way since the selection was originally run. If a record has been changed in such a way that it should no longer be in the selection result based on the conditions used to create the selection, the record will be removed. If a newly added or existing but changed record now qualifies to be in the selection when it didn't previously, it will be added. The refresh is what you will typically use to bring any existing selection up-to-date. You can refresh a single selection by opening the Selection Results window, highlighting the selection, and clicking the refresh button. You can also mark a block of selection results to be refreshed in batch mode using the Mark button of the Selection results window (holding down Alt-M will mark multiple consecutive selection results) prior to clicking the Refresh button. Note that refreshing a selection will not add back in records which were manually removed from the selection unless those records were edited in some way. This is because the refresh process uses the last modified date on each record to know which ones to look at to see if they should either be in or now out of the result. Manually removing a record from a result does not reset the last modified date for the record, so it will just slip "below the radar" for the result it used to be in unless the record is modified in data entry. If you want to account for such records and allow them back into a selection, use the Rebuild option instead.

Rebuilding A Selection Result

Rebuilding an existing selection result is very similar to Refreshing one and will yield the same result in most cases, except for the case mentioned above involving manually removed records. The rebuild process completely re-runs the selection, examining all records as they now exist in the database. It is effectively the same as if you had run the selection again from scratch, or used the ReSelect feature without changing any selection filter conditions. It accounts for all factors, and brings the result fully up-to-date with no exceptions or caveats. As with the refresh, you may mark a block of selection results to be rebuilt in batch mode using the Mark button of the Selection results window (holding down Alt-M will mark multiple consecutive selection results) prior to clicking the Rebuild button.

7.2.9 Operations Between Selections

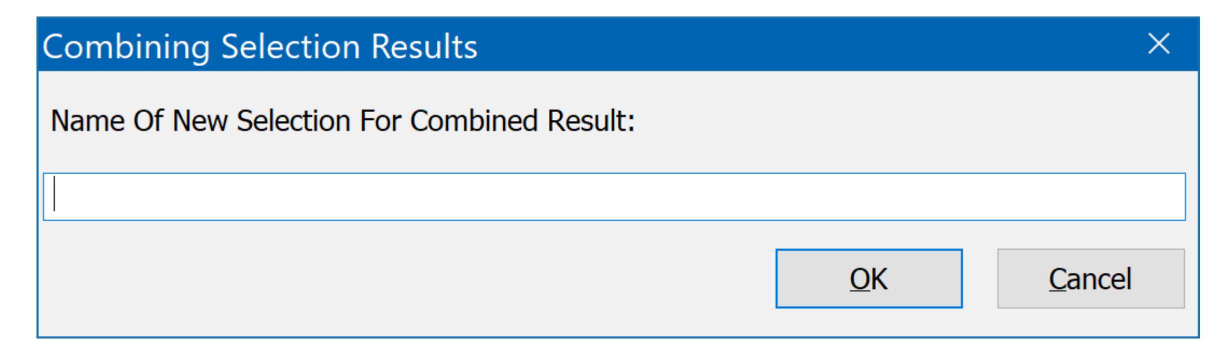
While the DonorQuest selection process allows you to create a selection result based on practically any conceivable condition, there may be times when it is easier to break your work down into smaller steps, especially if the final result you need is easier to conceptualize in term of existing selection results you already have. DonorQuest has four very powerful operations you can perform between selection results. These four operations are drawn from set theory in mathematics, but the ideas behind them are very simple. DonorQuest allows you to combine the records of multiple results, find the records multiple results have in common, take the records in one result out of another, or find all the records left out of a result. From the language of Set Theory, the operations are known as the Union Set, the Intersection Set, Difference Set, and the Inverse Set. But here they are in plain English:

Combining Selection Results (Union Set)

You are able to combine two (or more) selection results in DonorQuest. This may be desirable, for example, if you have completed two or three different selections for a mailing, but would like to only print one batch of labels or export one file. You can only combine selection results which are from the same dataset, and based on the same table -- usually the Header table. The combination process will produce an entirely new selection result to hold the combined records, leaving the original selection results as they were. Any duplicate records are automatically eliminated from the combined result. For example, even if donor John Smith is in two or more of the selection results you are combining, he will only be in the final result once. Likewise, if you are combining several donation results, you can be assured that each unique donation record will only appear in the final result once.

To combine multiple results, start by opening the Selection Results window by clicking on the Results button of the DonorQuest toolbar. Then, use the Mark button of the Selection Results window to mark all of the results you want to combine. If you want to mark a lot of consecutive results, you can do so by typing Alt-M repeatedly (or holding the key combination down). Once you have marked all of the results you wish to combine, click on the Selections menu, then choose Combine All Marked Results (Union Set). The following

dialog will appear, allowing you to enter a name for the new selection result which will be created to hold the combination of all the marked results:



Type a name and click Ok to complete the combination.

Finding Records In Common (Intersection Set)

The Intersection Set operation allows you to find all the records two or more marked selections have in common. For a record to be in the intersection, it must occur in all of the selection results you mark for processing. You can only intersect selection results which are from the same dataset, and table -- usually the Header table. The intersection process will produce an entirely new selection result to hold the records all the results have in common, leaving the original selection results as they were. This can be useful if, for example, you have two or more selection results, and you would like a composite result with the records which meet all of the conditions in the results you are considering. To intersect multiple results, start by opening the Selection Results window by clicking on the Results button of the DonorQuest toolbar. Then, use the Mark button of the Selection Results window to mark all of the results you want to intersect. If you want to mark a lot of consecutive results, you can do so by typing Alt-M. Once you have marked all of the results you wish to intersect, click on the Selections menu, then choose Find Records Common To All Marked Results (Intersection Set). Enter a name for the new result to hold the common records and click Ok to complete the intersection.

Subtracting One Selection From Another (Difference Set)

The Difference Set operation allows you to create a new result which will hold all of the records that are left when you subtract one selection from another. Here is an example:

Selection 1	Selection 2	Difference Set
John Smith	Justin Hayward	Jane Doe
Jane Doe	John Smith	Roger Waters
Justin Hayward		
Roger Waters		

In the above example if you were to subtract Selection 2 from Selection 1, you would get what is shown in the Difference Set column, and those records would be placed in a new

selection result. If we had two selections in DonorQuest named Selection 1 and Selection 2, to perform the difference operation shown above we would mark both Selection 1 and Selection 2, then leave the cursor positioned on Selection 1. Then, click the Selections menu and choose Subtract One Or More Results From Another (Difference Set).

It is also possible to subtract multiple selections from a single selection. In our example above, if we had a Selection 3, and we want to subtract both it and Selection 2 from Selection 1, we would mark all three, then again leave the cursor positioned on Selection 1 and click Selections, Subtract One Or More Results From Another (Difference Set). Just remember the cursor (blue highlight) in the Selection Results window must always be left on the one selection result you are doing all the subtracting from before you perform the difference operation.

Inverting A Selection (Inverse Set)

This selection operation can only be performed on one selection at a time. It simply creates a new result which has all of the records not in the result. So for example, if you had a selection result of all the people who responded to your ABC campaign, creating the inverse of that result would have all of the people who did not respond. To apply this operation to a selection, highlight the selection in the Selection Results window and click Selections, Create The Inverse Of As A New Result (Inverse Set).

Convert To Header Orientation

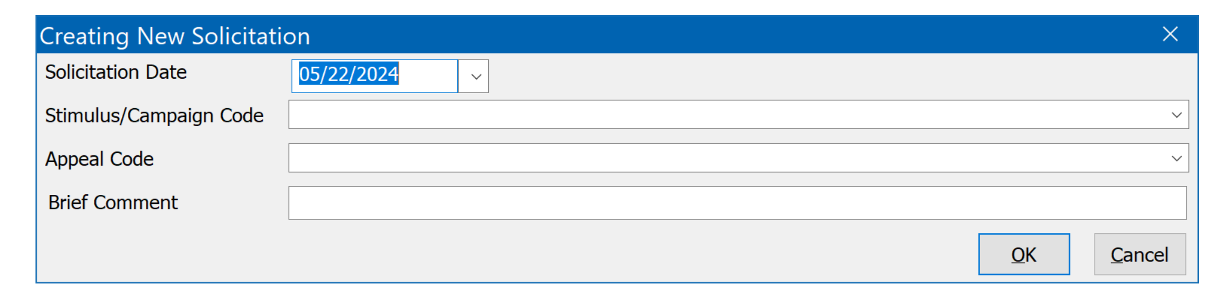
This is simply a quick and convenient way to take a selection originally based on one of the tables for which there can be many records for a given donor (Donations, Pledges, etc.) and convert it to a selection based on the Header table, for which there can only be one record per donor. It is the equivalent of running the selection again, using Header as the source table. This can be run by highlighting a selection result, then clicking on the Selections menu and choosing Convert To Header Orientation As A New Result.

7.2.10 Tracking Solicitations

Selections, Update Solicitation History Via...

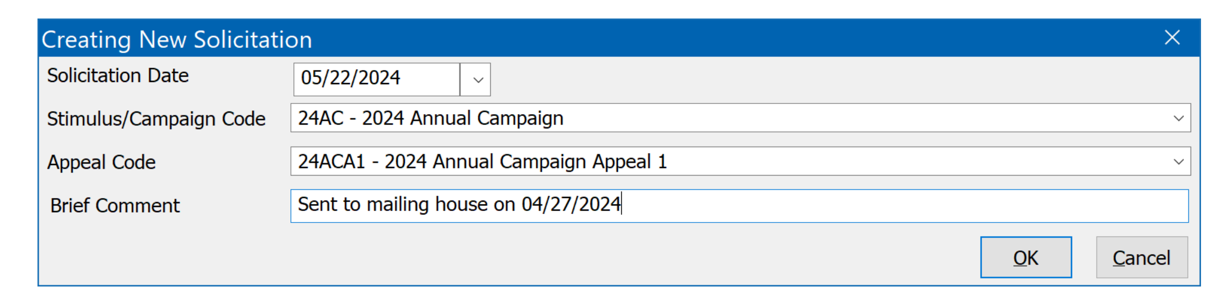
Whenever you run a selection of names which you plan to send a solicitation to, you can permanently record in the account of each selected donor that they received a particular solicitation. A solicitation can be by various means, including emailing, calling, direct mail you print in-house, a list you export from DonorQuest and send to a mailing house, etc. The number of solicitations each donor may have stored in DonorQuest is unlimited.

To permanently record that a Selection of donor/prospects received a particular solicitation, start by opening the DonorQuest Selection Results window, then highlight the particular selection you used for the solicitation and click on Selections, Update Solicitation History Via, Create New Entries. You will see the following dialog:

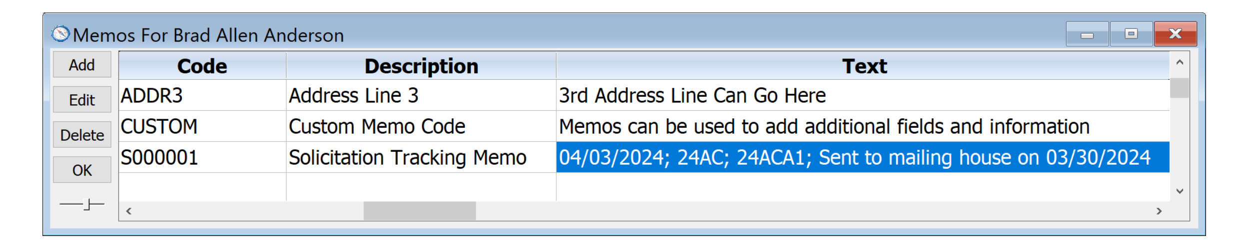


The Solicitation Date is the date you made the solicitation. The Stimulus/Campaign Code is the Donation Stimulus code you plan to use for donations which are received as a result of the solicitation. Likewise, the Appeal Code is the Donation Appeal code you will use for donations which are received as a result of the solicitation. The Brief Comment is simply that - any additional comment you want to make about the solicitation.

When you click the OK button, DonorQuest will go through all of the records in the Selection result, and make the solicitation entry in the corresponding constituent accounts. For example, if you used the following values:



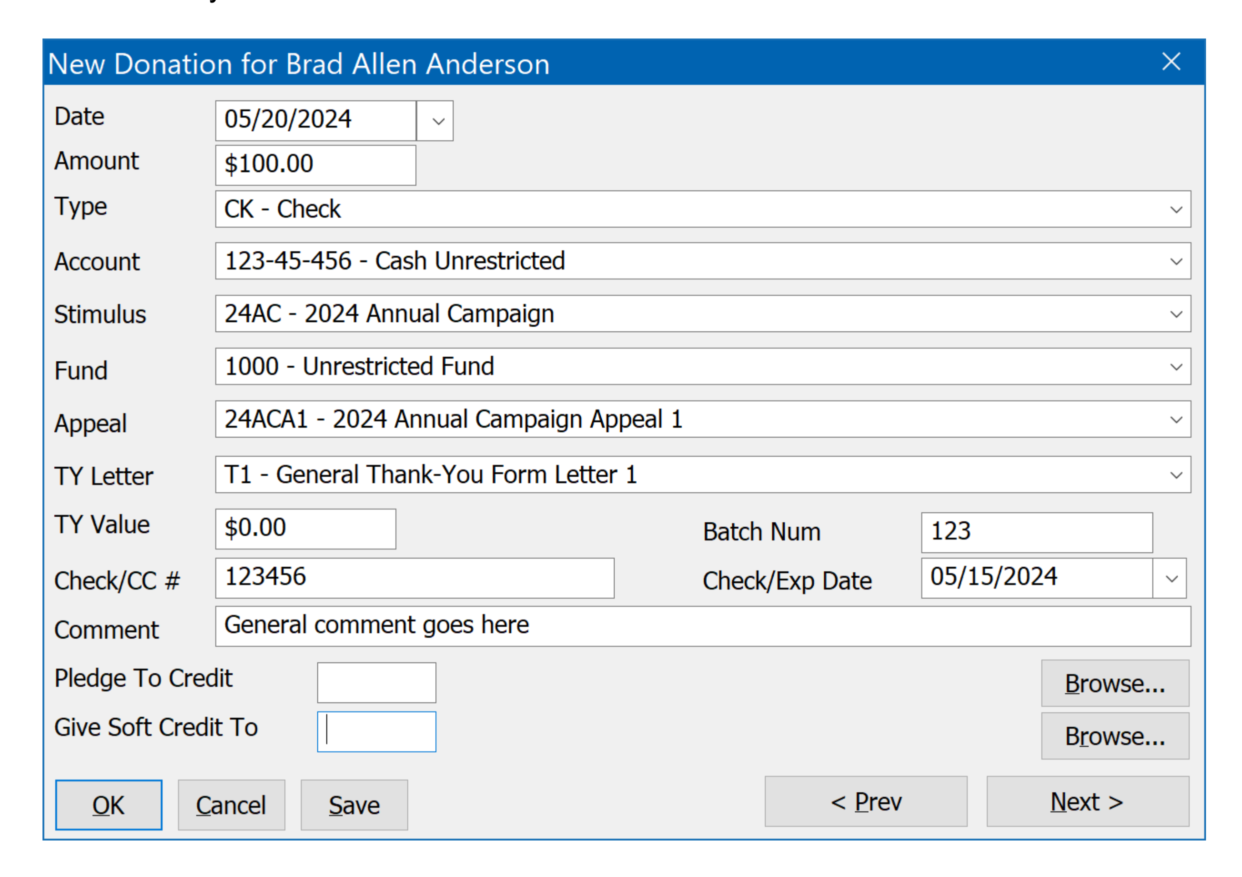
...Then the following memo will be added to the memo history for each solicitation recipient:



Since solicitations are stored as simple memos in DonorQuest, you may search and report on them using the Selection process in combination with the various memo-oriented reports and data exports built into DonorQuest, along with any custom report layouts or export field groups you create. Also, if your user rights within DonorQuest include the ability to delete memos, you can also delete the record of a specific solicitation if you wish. Notice the Code used for solicitation memos start with a letter "S", followed by a six digit number. These numbers are sequential for each donor/prospect account, and simply go up from 1. If for any reason you do delete old memos which tracked solicitations, there will be gaps in this numbering. To eliminate any gaps in the solicitation numbering, first run a selection for the donor/prospect accounts you wish to re-sequence the solicitation numbers for (the selection could be all constituent records in the database

if you wish), then with the selection result highlighted, click on Selections, Update Solicitation History Via, Resequence Solicitation Entry ID's.

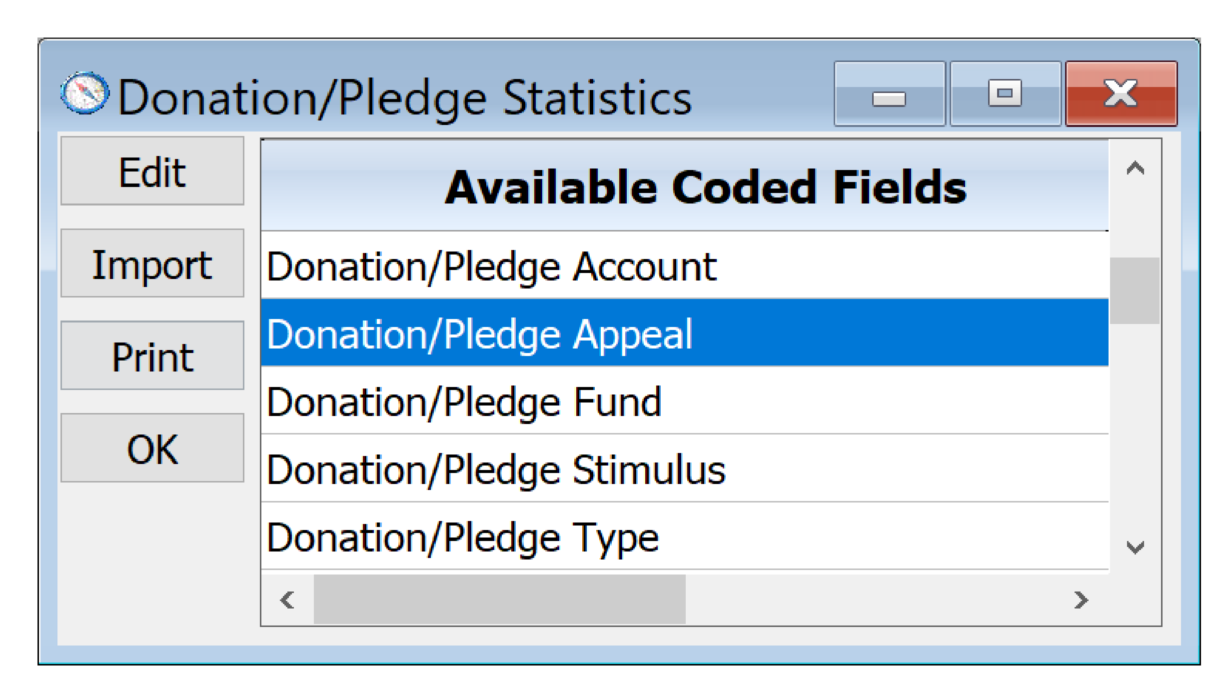
When the gifts start coming in for a particular appeal, be sure and use the same coding you established in the solicitation when you enter the gifts. Using our above example, your donation entry would look like this:



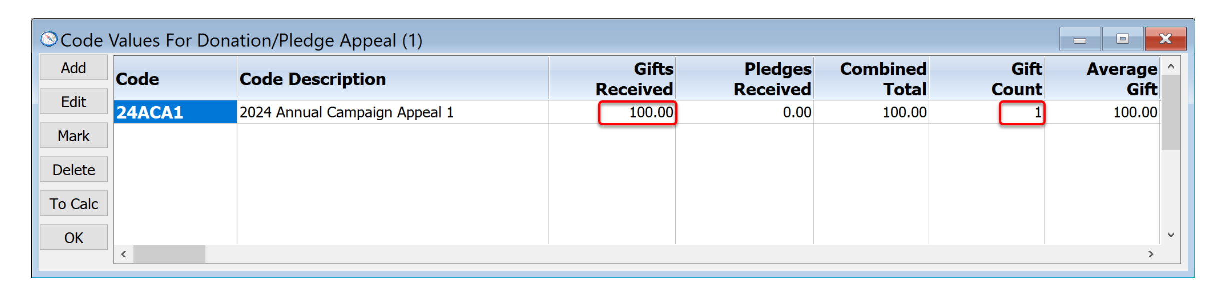
Notice that we used 17AC for the Donation Stimulus, and 17ACA1 for the Donation Appeal.

Analyzing Solicitation Returns

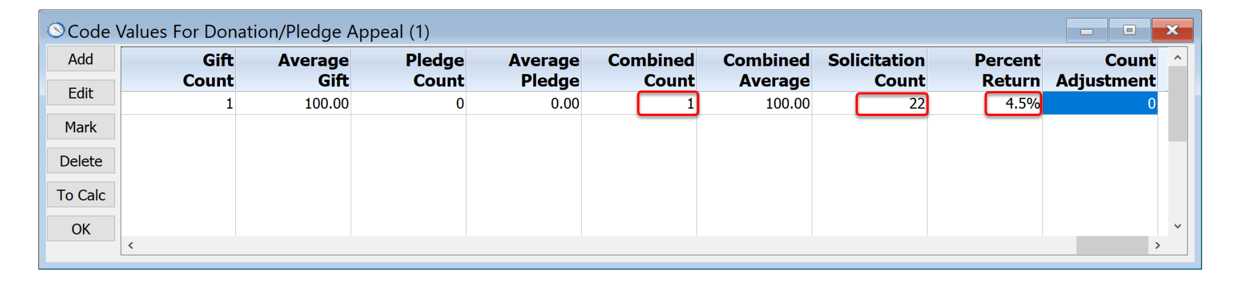
You can check on the progress of a solicitation at anytime in DonorQuest by clicking on Reports, Donation/Pledge Statistics. From there you will see the following menu:



To see how a particular appeal is doing, highlight the Donation/Pledge Appeal option and click the Edit button. You will then see a window showing you information on all of your active appeals, including the percentage of recipients who have responded to each solicitation with a donation. Using our above example for donor Brad Anderson, we would see the following for the 17ACA1 appeal if his were the only gift received so far:



Scrolling further to the right, we will see additional information about the appeal, including the Percent Return:



Note that in our example, the Selection we used for the solicitation only had 22 records, so the total Solicitation Count is 22. Of course a typical solicitation would be for thousands of recipients. And since in our example, Brad Anderson is the only person to have responded so far to the solicitation with his one gift of $100, we see that the Combined Count is 1,

and the Return (response) Rate is 1/22 or 4.5%

Topic VIII

8 Reports



In DonorQuest, Reports simply page layouts which allow you to see data in a particular format and layout, mainly intended for printing to paper or a PDF file. You can view a given selection result in many different report layouts, and you can use the same report layout for many different Selections. Selections do the filtering of the data, and reports do the presentation of the data. Over 500 standard report layouts are included with DonorQuest.

There are two ways to print reports, from the entire database or from a Selection Result. The majority of the time, a Selection Result will be the preferred method for printing reports since you will most often want a report on a select group of records. For example, donors meeting certain giving conditions or being on specific mailing lists.

The Report Writer is perhaps the most powerful feature of DonorQuest. You can create a printed report that is tailored to your exact needs. When creating a new report, you are able to specify exactly which fields to include in the report, and where in the report body each field is to occur. In addition, you can decide what text is to appear in the report heading lines, and those lines reserved for column headings.

DonorQuest is able to store custom report layouts, so that you create them only once. Part of the process of defining a report is specifying a name to associate with the report layout. When you wish to print a report, DonorQuest will display the report menu, consisting of the names of all currently defined reports -- both the pre-defined reports included with DonorQuest and any custom ones you or other people in your organization create.

As far as DonorQuest is concerned, there really is no difference between the reports you define, and those that came with the program (other than the fact you are not allowed to delete or modify any of the predefined reports). The reports shipped with DonorQuest serve as very good examples of what the Report Writer is capable of, and this section will make specific references to several of these reports. The predefined report layouts can also serve as starting points for creating your own custom report layouts.

The following subtopics show examples of all the stock report layouts included with DonorQuest, any of which may be copied and customized.

8.1 Sample Header (Main) Table Reports

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard & Soft Totals, No HONOR/MEMOR

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent ID, constituent name for individuals or the organization name for other donor types, yearly monetary totals for the current and past two calendar years for both hard and soft gifts attributed to each donor, and a total for the three years. Donations with a Stimulus code of "HONOR" or "MEMOR" are automatically excluded from the totals, as they represent honorarium or memorial donations. The report will include any soft credits received by each donor. The report is ordered in descending order by the 3-year total. Grand totals for all amounts are shown on the last page of the report. Non-monetary (alternate unit) gifts are automatically filtered out of the report. Note that while the sample below shows the report being run for all constituents, you would normally filter the constituent records you want to see via a selection. For example, you might select only constituents with recent giving.

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving** **Page 1**

Hard & Soft Totals, No HONOR/MEMOR Coded Donations

All Constituents

ID Num	Giving Entity	2018	2017	2016	3-Year Total
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	108,000.00	108,000.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	50,000.00
12	Hayward, Justin	0.00	9,700.00	8,000.00	17,700.00
18	Bowie, Denise	0.00	8,450.00	0.00	8,450.00
32	Intrepid Systems Inc.	0.00	1,200.00	5,000.00	6,200.00
10	Waters, Roger	0.00	4,000.00	0.00	4,000.00
15	Baker, Thomas	0.00	750.00	2,600.00	3,350.00
1	Burke, James	0.00	800.00	500.00	1,300.00
53	Musk, Elon	0.00	1,000.00	0.00	1,000.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	600.00
28	Bach Memorial Account	0.00	500.00	0.00	500.00
17	Foster, James	0.00	450.00	0.00	450.00
11	Decca Records	50.00	0.00	0.00	50.00
3	Trek Foundation	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00
		50.00	77,450.00	124,100.00	201,600.00

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard And Soft Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent ID Number, the constituent name for individuals or organization name for other donor types, yearly monetary totals for the current and past two calendar years for both hard and soft gifts attributed to each donor, and a total for the three years. The report is ordered in descending order by the 3-year total. Grand totals for all amounts are shown on the last page of the report. Non-monetary (alternate unit) gifts are automatically filtered out of the report. This report is very similar to the, "Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard & Soft Totals, No HONOR/MEMOR", but will not filter out honorarium or memorial gifts.

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard And Soft Totals** **Page 1**

All Constituents

ID Num	Giving Entity	2018	2017	2016	3-Year Total
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	108,000.00	108,000.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	50,000.00
12	Hayward, Justin	0.00	9,700.00	8,000.00	17,700.00
18	Bowie, Denise	0.00	8,450.00	0.00	8,450.00
32	Intrepid Systems Inc.	0.00	1,200.00	5,000.00	6,200.00
10	Waters, Roger	0.00	4,000.00	0.00	4,000.00
15	Baker, Thomas	0.00	750.00	2,600.00	3,350.00
1	Burke, James	0.00	800.00	500.00	1,300.00
53	Musk, Elon	0.00	1,000.00	0.00	1,000.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	600.00
28	Bach Memorial Account	0.00	500.00	0.00	500.00
17	Foster, James	0.00	450.00	0.00	450.00
11	Decca Records	50.00	0.00	0.00	50.00
3	Trek Foundation	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00
		50.00	77,450.00	124,100.00	201,600.00

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With # of Donors and Donor Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent ID Number, the constituent name for individuals or organization name for other donor types, yearly monetary totals and gift counts for the current and past two calendar years for each donor, and a dollar total for the three years. The reports is ordered in descending order by the 3-year total. Grand totals for all amounts are shown on the last page of the report. Non-monetary (alternate unit) gifts are automatically filtered out of the report.

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, # Donors, Donor Totals** Page 1

All Constituents

ID Num	Giving Entity	2018	Count	2017	Count	2016	Count	3-Year Total
29	Northern Songs Limited, (U.S. D	0.00	0	0.00	0	108,000.00	4	108,000.00
27	The Corporation For Public Broa	0.00	0	50,000.00	1	0.00	0	50,000.00
12	Hayward, Justin	0.00	0	9,700.00	1	8,000.00	1	17,700.00
18	Bowie, Denise	0.00	0	8,450.00	1	0.00	0	8,450.00
32	Intrepid Systems Inc.	0.00	0	1,200.00	3	5,000.00	1	6,200.00
10	Waters, Roger	0.00	0	4,000.00	1	0.00	0	4,000.00
15	Baker, Thomas	0.00	0	750.00	1	2,600.00	2	3,350.00
1	Burke, James	0.00	0	800.00	1	500.00	1	1,300.00
7	Schmidt Aeronautic Foundation	0.00	0	600.00	1	0.00	0	600.00
28	Bach Memorial Account	0.00	0	500.00	1	0.00	0	500.00
17	Foster, James	0.00	0	450.00	1	0.00	0	450.00
11	Decca Records	50.00	0	0.00	0	0.00	0	50.00
3	Trek Foundation	0.00	0	0.00	0	0.00	0	0.00
26	Smith, John	0.00	0	0.00	0	0.00	0	0.00
8	Scott, Montgomery	0.00	0	0.00	0	0.00	0	0.00
2	Progressive Music, Inc.	0.00	0	0.00	0	0.00	0	0.00
53	Musk, Elon	0.00	0	0.00	0	0.00	0	0.00
5	Mozart Memorial Account	0.00	0	0.00	0	0.00	0	0.00
23	Lodge, John	0.00	0	0.00	0	0.00	0	0.00
13	Lennon, John	0.00	0	0.00	0	0.00	0	0.00
19	Koneig, John	0.00	0	0.00	0	0.00	0	0.00
21	Knight, Paula	0.00	0	0.00	0	0.00	0	0.00
24	IBM Corporation	0.00	0	0.00	0	0.00	0	0.00
4	Gore, Martin L.	0.00	0	0.00	0	0.00	0	0.00
20	Burke, James	0.00	0	0.00	0	0.00	0	0.00
6	1984 Productions	0.00	0	0.00	0	0.00	0	0.00
		50.00	0	76,450.00	12	124,100.00	9	200,600.00

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent ID Number, the constituent name for individuals or organization name for other donor types, and yearly monetary totals for the current and past two calendar years. The reports is ordered in descending order by the 3-year total. Grand totals for all amounts are shown on the last page of the report. Non-monetary (alternate unit) gifts and soft credits are automatically filtered out of the report.

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals** **Page 1**

All Constituents

ID Num	Giving Entity	2018	2017	2016	3-Year Total
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	108,000.00	108,000.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	50,000.00
12	Hayward, Justin	0.00	9,700.00	8,000.00	17,700.00
18	Bowie, Denise	0.00	8,450.00	0.00	8,450.00
32	Intrepid Systems Inc.	0.00	1,200.00	5,000.00	6,200.00
10	Waters, Roger	0.00	4,000.00	0.00	4,000.00
15	Baker, Thomas	0.00	750.00	2,600.00	3,350.00
1	Burke, James	0.00	800.00	500.00	1,300.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	600.00
28	Bach Memorial Account	0.00	500.00	0.00	500.00
17	Foster, James	0.00	450.00	0.00	450.00
11	Decca Records	50.00	0.00	0.00	50.00
3	Trek Foundation	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00
		50.00	76,450.00	124,100.00	200,600.00

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Calendar Year TY Amounts, With Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent ID Number, the constituent name for individuals or organization name for other donor types, and yearly non-tax-deductible totals for the current and past two calendar years, and a the non-tax-deductible total for the three years. The reports is ordered in descending order by the 3-year total. Grand totals for all amounts are shown on the last page of the report. Non-monetary (alternate unit) gifts are automatically filtered out of the report. The non-tax-deductible amount for each gift is stored in the Donation TY Value field for each donation. This field is normally zero for donations which are fully tax-deductible, as the sample report below shows:

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Calendar Year TY Amounts, With Totals** Page 1

All Constituents

ID Num	Giving Entity	2015	2016	2017	3-Year Total
6	1984 Productions	0.00	0.00	0.00	0.00
28	Bach Memorial Account	0.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	0.00	0.00	0.00
18	Bowie, Denise	0.00	0.00	0.00	0.00
1	Burke, James	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00
11	Decca Records	0.00	0.00	0.00	0.00
17	Foster, James	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
32	Intrepid Systems Inc.	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00
10	Waters, Roger	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard & Soft Totals, No HONOR/MEMOR

Description

This report layout is the same as, "Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard & Soft Totals, No HONOR/MEMOR", but shows fiscal year totals instead of calendar year totals. Note that DonorQuest uses the Fiscal Year settings under Configure, Program Settings to know the starting month and current fiscal year for your organization.

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving** Page 1
Hard & Soft Totals, No HONOR/MEMOR Donations
All Constituents

ID Num	Giving Entity	2018	2017	2016	3-Year Total
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	178,000.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	50,000.00
12	Hayward, Justin	0.00	17,700.00	7,500.00	25,200.00
18	Bowie, Denise	0.00	8,450.00	0.00	8,450.00
32	Intrepid Systems Inc.	0.00	6,200.00	2,000.00	8,200.00
10	Waters, Roger	0.00	4,000.00	0.00	4,000.00
15	Baker, Thomas	0.00	750.00	3,100.00	3,850.00
1	Burke, James	800.00	0.00	500.00	1,300.00
53	Musk, Elon	0.00	1,000.00	0.00	1,000.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	600.00
28	Bach Memorial Account	0.00	500.00	0.00	500.00
17	Foster, James	0.00	450.00	0.00	450.00
11	Decca Records	50.00	0.00	0.00	50.00
3	Trek Foundation	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00
		850.00	197,650.00	83,100.00	281,600.00

Report Menu Name

Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard And Soft Totals

Description

This report layout is the same as, "Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard And Soft Totals", but shows fiscal year totals instead of calendar year totals.

01/22/2018 **Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard And Soft Totals** **Page 1**

All Constituents

ID Num	Giving Entity	2018	2017	2016	3-Year Total
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	178,000.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	50,000.00
12	Hayward, Justin	0.00	17,700.00	7,500.00	25,200.00
18	Bowie, Denise	0.00	8,450.00	0.00	8,450.00
32	Intrepid Systems Inc.	0.00	6,200.00	2,000.00	8,200.00
10	Waters, Roger	0.00	4,000.00	0.00	4,000.00
15	Baker, Thomas	0.00	750.00	3,100.00	3,850.00
1	Burke, James	800.00	0.00	500.00	1,300.00
53	Musk, Elon	0.00	1,000.00	0.00	1,000.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	600.00
28	Bach Memorial Account	0.00	500.00	0.00	500.00
17	Foster, James	0.00	450.00	0.00	450.00
11	Decca Records	50.00	0.00	0.00	50.00
3	Trek Foundation	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00
		850.00	197,650.00	83,100.00	281,600.00

Report Menu Name

Header - All Donors, Donation Totals Since 01/01/2017 In Descending Order

Description

Designed to be used with a Header-based Selection Result, this report layout will rank constituents based on their total monetary giving since a specific date. To change the specific date, you would copy the stock report layout, then click the Setup button and change the date where it occurs on the Options and Fields tabs. Note that the example below show the report run against all constituent records in our sample database, even those who have no giving since 01/01/2017. But normally you would run a Selection for the donors you wish to include on the report.

01/25/2018 **Header - All Donors, Donation Totals Since 01/01/2017 In Descending Order** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Total Since 01/01/2017
1	27	The Corporation For Public Broadcasting	Corporation	50,000.00
2	12	Hayward, Justin	Individual	9,700.00
3	18	Bowie, Denise	Individual	8,450.00
4	10	Waters, Roger	Individual	4,000.00
5	32	Intrepid Systems Inc.	Church	1,200.00
6	1	Burke, James	Individual	800.00
7	15	Baker, Thomas	Individual	750.00
8	7	Schmidt Aeronautic Foundation	Foundation	600.00
9	28	Bach Memorial Account	Memorial Record	500.00
10	17	Foster, James	Individual	450.00
11	11	Decca Records	Corporation	50.00
12	6	1984 Productions	Corporation	0.00
13	20	Burke, James	Individual	0.00
14	4	Gore, Martin L.	Individual	0.00
15	24	IBM Corporation	Corporation	0.00
16	21	Knight, Paula	Individual	0.00
18	13	Lennon, John	Individual	0.00
19	23	Lodge, John	Individual	0.00
20	5	Mozart Memorial Account	Memorial Record	0.00
22	29	Northern Songs Limited, (U.S. Division)	Corporation	0.00
23	2	Progressive Music, Inc.	Organization	0.00
24	8	Scott, Montgomery	Individual	0.00
25	26	Smith, John	Individual	0.00
26	3	Trek Foundation	Foundation	0.00
				76,500.00

Report Menu Name

Header - All Donors, Lifetime Donation AND Outstanding Pledge Totals In Descending Order

Description

Designed to be used with a Header-based Selection Result, this report layout will rank constituents based on their combined lifetime giving history, and their total outstanding pledge balance.

01/25/2018 Header - All Donors, Lifetime Donation AND Outstanding Pledge Totals In Descending Order Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Lifetime Donation Total	Outstanding Pledge Total	Combined Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	343,500.00	0.00	343,500.00
2	12	Hayward, Justin	Individual	94,010.00	25,000.00	119,010.00
3	32	Intrepid Systems Inc.	Church	32,600.00	30,950.69	63,550.69
4	27	The Corporation For Public Broadcasting	Corporation	50,000.00	0.00	50,000.00
5	10	Waters, Roger	Individual	20,250.00	6,750.00	27,000.00
6	15	Baker, Thomas	Individual	21,550.00	3,700.00	25,250.00
7	18	Bowie, Denise	Individual	20,950.00	0.00	20,950.00
8	13	Lennon, John	Individual	17,000.00	0.00	17,000.00
9	1	Burke, James	Individual	15,100.00	500.00	15,600.00
10	24	IBM Corporation	Corporation	14,814.23	250.00	15,064.23
11	23	Lodge, John	Individual	13,500.00	0.00	13,500.00
12	21	Knight, Paula	Individual	11,800.00	0.00	11,800.00
13	3	Trek Foundation	Foundation	11,200.00	0.00	11,200.00
14	20	Burke, James	Individual	8,914.00	0.00	8,914.00
15	7	Schmidt Aeronautic Foundation	Foundation	6,700.00	1,200.00	7,900.00
16	2	Progressive Music, Inc.	Organization	2,896.00	0.00	2,896.00
17	28	Bach Memorial Account	Memorial Record	1,250.00	1,250.00	2,500.00
18	11	Decca Records	Corporation	850.00	1,200.00	2,050.00
19	6	1984 Productions	Corporation	2,000.00	0.00	2,000.00
20	4	Gore, Martin L.	Individual	2,160.00	0.00	2,160.00
21	17	Foster, James	Individual	1,625.00	100.00	1,725.00
22	5	Mozart Memorial Account	Memorial Record	500.00	500.00	1,000.00
23	8	Scott, Montgomery	Individual	1,000.00	0.00	1,000.00
24	26	Smith, John	Individual	200.00	0.00	200.00
				694,369.23	71,400.69	765,769.92

Report Menu Name

Header - All Donors, Lifetime Donation Totals In Descending Order

Description

Designed to be used with a Header-based Selection Result, this report layout will rank constituents based on their total lifetime monetary giving.

01/25/2018 Header - All Donors, Lifetime Donation Totals In Descending Order Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Lifetime Donation Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	343,500.00
2	12	Hayward, Justin	Individual	94,010.00
3	27	The Corporation For Public Broadcasting	Corporation	50,000.00
4	32	Intrepid Systems Inc.	Church	32,600.00
5	15	Baker, Thomas	Individual	21,550.00
6	18	Bowie, Denise	Individual	20,950.00
7	10	Waters, Roger	Individual	20,250.00
8	13	Lennon, John	Individual	17,000.00
9	1	Burke, James	Individual	15,100.00
10	24	IBM Corporation	Corporation	14,814.23
11	23	Lodge, John	Individual	13,500.00
12	21	Knight, Paula	Individual	11,800.00
13	3	Trek Foundation	Foundation	11,200.00
14	20	Burke, James	Individual	8,914.00
15	7	Schmidt Aeronautic Foundation	Foundation	6,700.00
16	2	Progressive Music, Inc.	Organization	2,896.00
17	4	Gore, Martin L.	Individual	2,160.00
18	6	1984 Productions	Corporation	2,000.00
19	17	Foster, James	Individual	1,625.00
20	28	Bach Memorial Account	Memorial Record	1,250.00
21	8	Scott, Montgomery	Individual	1,000.00
22	11	Decca Records	Corporation	850.00
23	5	Mozart Memorial Account	Memorial Record	500.00
24	26	Smith, John	Individual	200.00
				694,369.23

Report Menu Name

Header - Birthdays By Month

Description

Designed to be used with a Header-based Selection Result, this report layout will show a list of constituent names, addresses, and birthdates, grouped by the month in which their birthdays are.

01/25/2018 **Header - Birthdays By Month** **Page 1**

All Constituents

Last Name	First Name	Birthday	Address	Address2	City	State	Zip
Birthdays In January							
Mozart	Wolfgang	01/27/1756	62734 Vienna Ave		Salzburg	CA	92104
Birthdays In February							
McGoohan	Patrick	02/05/1970	1984 In The Village		Oceania	CA	95070-321
Bach	Johann	02/05/1970	3543 Brandenburg Way		Seattle	WA	98109
Baker	Thomas	02/05/1945	4968 Tardis Ave.		San Jose	CA	95112-321
Bowie	Denise	02/05/1970	123 First Avenue	Apt 200	San Jose	CA	95119-231
Burke	James	02/05/1970	826 Connections Way		Palo Alto	CA	94304-789
Davidson	Peter	02/05/1970	3775 Galafrey Way		Palo Alto	CA	94300-211
Foster	James	02/05/1970	14552 Medical Dr.		Saratoga	CA	95070-321
Hayward	Justin	02/05/1945	1701 Enterprise Way		Seattle	WA	98109
Koneig	John	02/05/1970	12344 First Way		San Jose	CA	95135-243
Schmidt	Christopher	02/05/1970	368 Moore Ave.		Saratoga	CA	95070-123
Scott	Montgomery	02/05/1970	685 Cherrystone Drive		Schenectady	NY	12345
Birthdays In March							
Lodge	John	03/05/1945	71828 One Way		Yuba City	CA	95991-317
Birthdays In April							
Anderson	Brad	04/27/1964	701 Galer St.		Seattle	WA	98109
Birthdays In May							
Gore	Martin L.	05/05/1970	Stanford OPA Bldg.		Eugene	OR	97401
Jarre	Jean-Michel	05/05/1970	644 Santa Rita		Seattle	WA	98109-123
Kirk	James	05/05/1970	1701 Enterprise Way		Mount Shasta	CA	96067-123
Birthdays In June							
Burke	James	06/05/1970	826 Connections Way		Palo Alto	CA	94304-789
Harrison	Timothy	06/05/1970	486 Intel Way.		San Jose	CA	95131-123
Knight	Paula	06/05/1970	1410 Holly Ave.		San Jose	CA	95133-433
Musk	Elon	06/28/1971				WA	
Birthdays In July							
Smith	John	07/05/1970	4321 Another Smith Wa		San Mateo	CA	94403
Birthdays In August							
Harrison	George	08/05/1970	234 Abbey Road		San Francisco	CA	94161-232
Burke	James	08/05/1970	1105 Information Avenu		San Francisco	CA	94175
Birthdays In September							
Waters	Roger	09/05/1970	1234 Beyond The Wall		San Mateo	CA	94403
Birthdays In October							
Lennon	John	10/09/1940	234 Abbey Road		San Francisco	CA	94161-232

Report Menu Name

Header - Calendar Year Totals And Donation Counts For Previous Two Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent name, ID number, total giving for the previous two calendar years, and a count of how many donations the constituent made in each of the years. There is also a fiscal year version of this report named, "Header - Fiscal Year Totals And Donation Counts For Previous Two Years."

01/25/2018 **Header - Calendar Year Totals And Donation Counts For Previous Two Years** **Page 1**

All Constituents

ID Num	Giving Entity	2017	Count	2016	Count
32	Intrepid Systems Inc.	1,200.00	3	5,000.00	1
28	Bach Memorial Account	500.00	1	0.00	0
15	Baker, Thomas	750.00	1	2,600.00	2
18	Bowie, Denise	8,450.00	1	0.00	0
1	Burke, James	800.00	1	500.00	1
20	Burke, James	0.00	0	0.00	0
27	The Corporation For Public Broadcasting	50,000.00	1	0.00	0
11	Decca Records	0.00	0	0.00	0
17	Foster, James	450.00	1	0.00	0
4	Gore, Martin L.	0.00	0	0.00	0
29	Northern Songs Limited, (U.S. Division)	0.00	0	108,000.00	4
24	IBM Corporation	0.00	0	0.00	0
12	Hayward, Justin	9,700.00	1	8,000.00	1
2	Progressive Music, Inc.	0.00	0	0.00	0
3	Trek Foundation	0.00	0	0.00	0
21	Knight, Paula	0.00	0	0.00	0
19	Koneig, John	0.00	0	0.00	0
13	Lennon, John	0.00	0	0.00	0
23	Lodge, John	0.00	0	0.00	0
6	1984 Productions	0.00	0	0.00	0
5	Mozart Memorial Account	0.00	0	0.00	0
53	Musk, Elon	0.00	0	0.00	0
7	Schmidt Aeronautic Foundation	600.00	1	0.00	0
8	Scott, Montgomery	0.00	0	0.00	0
26	Smith, John	0.00	0	0.00	0
10	Waters, Roger	4,000.00	1	0.00	0
		76,450.00	12	124,100.00	9

Report Menu Name

Header - Calendar Year Totals And Donor Counts For Previous Two Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent name, ID number, total giving for the previous two calendar years, and a simple counter column for each year. These counter columns will simply register a 1 if the donor gave in the corresponding year, or a zero if not. Since these counters are summed on the last page of the report, you will be able to see if the count of donors for each of the years increased or decreased, and by how much. There is also a fiscal year version of this report named, "Header - Calendar Year Totals And Donor Counts For Previous Two Years."

01/25/2018 **Header - Calendar Year Totals And Donor Counts For Previous Two Years** **Page 1**

All Constituents

ID Num	Giving Entity	2017	Donor Count	2016	Donor Count
32	Intrepid Systems Inc.	1,200.00	1	5,000.00	1
28	Bach Memorial Account	500.00	1	0.00	0
15	Baker, Thomas	750.00	1	2,600.00	1
18	Bowie, Denise	8,450.00	1	0.00	0
1	Burke, James	800.00	1	500.00	1
20	Burke, James	0.00	0	0.00	0
27	The Corporation For Public Broadcasting	50,000.00	1	0.00	0
11	Decca Records	0.00	0	0.00	0
17	Foster, James	450.00	1	0.00	0
4	Gore, Martin L.	0.00	0	0.00	0
29	Northern Songs Limited, (U.S. Division)	0.00	0	108,000.00	1
24	IBM Corporation	0.00	0	0.00	0
12	Hayward, Justin	9,700.00	1	8,000.00	1
2	Progressive Music, Inc.	0.00	0	0.00	0
3	Trek Foundation	0.00	0	0.00	0
21	Knight, Paula	0.00	0	0.00	0
19	Koneig, John	0.00	0	0.00	0
13	Lennon, John	0.00	0	0.00	0
23	Lodge, John	0.00	0	0.00	0
6	1984 Productions	0.00	0	0.00	0
5	Mozart Memorial Account	0.00	0	0.00	0
53	Musk, Elon	0.00	0	0.00	0
7	Schmidt Aeronautic Foundation	600.00	1	0.00	0
8	Scott, Montgomery	0.00	0	0.00	0
26	Smith, John	0.00	0	0.00	0
10	Waters, Roger	4,000.00	1	0.00	0
		76,450.00	10	124,100.00	5

Report Menu Name

Header - City Counts With Donation Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will count the number of constituents in each city, and display their lifetime giving.

01/25/2018 **Header - City Counts With Donation Totals** **Page 1**

All Constituents

City	State	Count	Donation Amount
	WA	1	0.00
Eugene	OR	1	560.00
Mount Shasta	CA	1	350.00
Oceania	CA	1	400.00
Palo Alto	CA	3	1,450.00
Salzburg	CA	1	500.00
San Francisco	CA	3	69,000.00
San Jose	CA	5	26,545.67
San Mateo	CA	2	4,000.00
Saratoga	CA	2	1,050.00
Schenectady	NY	1	1,000.00
Seattle	WA	4	11,025.00
Yuba City	CA	1	700.00
		26	116,580.67

Report Menu Name

Header - City Groupings

Description

Designed to be used with a Header-based Selection Result, this report layout is a detailed variation on the, "Header - City Counts With Donation Totals" report. It shows the names and addresses of the actual constituents behind the totals shown on the, "Header - City Counts With Donation Totals" report.

01/25/2018 — Header - City Groupings — All Constituents — Page 1

ID Num	Last Name	First Name	Organization Name	Address	Address2	State	Count
City: Eugene							
4	Gore	Martin L.		Stanford OPA Bldg.		OR	
							1
City: Fremont							
53	Musk	Elon	SpaceX	3141 Tesla Ave.		CA	
							1
City: Mount Shasta							
3	Kirk	James	Trek Foundation	1701 Enterprise Way		CA	
							1
City: Oceania							
6	McGoohan	Patrick	1984 Productions	1984 In The Village		CA	
							1
City: Palo Alto							
1	Burke	James		826 Connections Way		CA	
11	Davidson	Peter	Decca Records	3775 Galafrey Way		CA	
20	Burke	James		826 Connections Way		CA	
							3
City: Salzburg							
5	Mozart	Wolfgang	Mozart Memorial Account	62734 Vienna Ave		CA	
							1
City: San Francisco							
13	Lennon	John		234 Abbey Road		CA	
27	Burke	James	The Corporation For Public Broadcasting	1105 Information Avenue		CA	
29	Harrison	George	Northern Songs Limited, (U.S. Division)	234 Abbey Road		CA	
							3

Report Menu Name

Header - Comparison Of Hard And Soft Year-To-Year Giving By Calendar Year

Description

Designed to be used with a Header-based Selection Result, this report layout will show the combined hard and soft monetary giving of constituents for the current and past four calendar years. The report is ordered by constituent name.

01/26/2018 **Header - Comparison Of Hard And Soft Year-To-Year Giving By Calendar Year** **Page 1**

All Constituents

ID Num	Giving Entity	2018	2017	2016	2015	2014
6	1984 Productions	0.00	0.00	0.00	0.00	750.00
28	Bach Memorial Account	0.00	500.00	0.00	10,000.00	0.00
15	Baker, Thomas	0.00	750.00	2,600.00	2,000.00	1,450.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00
1	Burke, James	0.00	800.00	500.00	0.00	1,000.00
20	Burke, James	0.00	0.00	0.00	0.00	600.00
11	Decca Records	50.00	0.00	0.00	0.00	0.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	560.00
12	Hayward, Justin	0.00	9,700.00	8,000.00	7,500.00	6,500.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
32	Intrepid Systems Inc.	0.00	1,200.00	5,000.00	2,000.00	1,000.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00	5,000.00
23	Lodge, John	0.00	0.00	0.00	5,700.00	7,500.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	17,500.00
53	Musk, Elon	0.00	1,000.00	0.00	0.00	0.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	108,000.00	70,000.00	50,000.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	725.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	350.00
10	Waters, Roger	0.00	4,000.00	0.00	0.00	10,000.00
		50.00	77,450.00	124,100.00	107,700.00	105,435.00

Report Menu Name

Header - Comparison Of Hard And Soft Year-To-Year Giving By Fiscal Year

Description

Designed to be used with a Header-based Selection Result, this report layout will show the combined hard and soft monetary giving of constituents for the current and past four fiscal years. The report is ordered by constituent name.

01/26/2018 **Header - Comparison Of Hard And Soft Year-To-Year Giving By Fiscal Year** Page 1

All Constituents

ID Num	Giving Entity	2018	2017	2016	2015	2014
6	1984 Productions	0.00	0.00	0.00	0.00	1,300.00
28	Bach Memorial Account	0.00	500.00	0.00	10,000.00	0.00
15	Baker, Thomas	0.00	750.00	3,100.00	1,600.00	1,350.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00
1	Burke, James	800.00	0.00	500.00	0.00	5,800.00
20	Burke, James	0.00	0.00	0.00	0.00	2,282.00
11	Decca Records	50.00	0.00	0.00	0.00	200.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	760.00
12	Hayward, Justin	0.00	17,700.00	7,500.00	6,500.00	6,000.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
32	Intrepid Systems Inc.	0.00	6,200.00	2,000.00	0.00	1,000.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,600.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	5,000.00	12,000.00
23	Lodge, John	0.00	0.00	0.00	13,200.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	17,500.00	0.00
53	Musk, Elon	0.00	1,000.00	0.00	0.00	0.00
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	50,000.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	1,609.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	600.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	1,850.00
10	Waters, Roger	0.00	4,000.00	0.00	10,000.00	0.00
		850.00	197,650.00	83,100.00	124,300.00	37,351.00

Report Menu Name

Header - Comparison Of Month-To-Month Giving, Calendar Year 1 Year Ago

Description

Designed to be used with a Header-based Selection Result, this report layout will show a comparison of the total monetary giving by each constituent for each month of the year, one year ago, plus a total for the year. There is also a fiscal year version of this report on the DonorQuest report menu.

01/26/2018 | **Header - Comparison Of Month-To-Month Giving, Calendar Year 1 Year Ago** | **Page 1**

Calendar 2017

All Constituents

Giving Entity	January	February	March	April	May	June	July	August	September	October	November	December	Total
Intrepid Systems Inc.	0.00	0.00	1,000.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,200.00
Bach Memorial Account	0.00	0.00	0.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
Baker, Thomas	0.00	0.00	750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	750.00
Bowie, Denise	0.00	0.00	8,450.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8,450.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	800.00	800.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
The Corporation For Public Bro	0.00	0.00	50,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50,000.00
Decca Records	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Foster, James	450.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	450.00
Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Northern Songs Limited, (U.S.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hayward, Justin	0.00	0.00	9,700.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9,700.00
Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Knight, Paula	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Koneig, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lennon, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lodge, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1984 Productions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musk, Elon	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Schmidt Aeronautic Foundatio	600.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	600.00
Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Smith, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waters, Roger	0.00	0.00	4,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,000.00
	1,050.00	0.00	73,900.00	700.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	800.00	76,450.00

Report Menu Name

Header - Comparison Of Month-To-Month Giving, Calendar Year 2 Years Ago

Description

Designed to be used with a Header-based Selection Result, this report layout will show a comparison of the total monetary giving by each constituent for each month of the year, two years ago, plus a total for the year. There is also a fiscal year version of this report on the DonorQuest report menu.

01/26/2018 **Header - Comparison Of Month-To-Month Giving, Calendar Year 2 Years Ago** Page 1

Calendar 2016

All Constituents

Giving Entity	January	February	March	April	May	June	July	August	September	October	November	December	Total
Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00	0.00	5,000.00
Bach Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Baker, Thomas	2,500.00	0.00	0.00	0.00	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,600.00
Bowie, Denise	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Burke, James	0.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
The Corporation For Public Bro	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Decca Records	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Foster, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Northern Songs Limited, (U.S.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	108,000.00	0.00	108,000.00
IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hayward, Justin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8,000.00	0.00	0.00	8,000.00
Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Knight, Paula	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Koneig, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lennon, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lodge, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1984 Productions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musk, Elon	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Schmidt Aeronautic Foundatio	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Smith, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waters, Roger	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	2,500.00	500.00	0.00	0.00	100.00	0.00	0.00	0.00	0.00	8,000.00	113,000.00	0.00	124,100.00

Report Menu Name

Header - Comparison Of Month-To-Month Giving, Calendar Year 3 Years Ago

Description

Designed to be used with a Header-based Selection Result, this report layout will show a comparison of the total monetary giving by each constituent for each month of the year, three years ago, plus a total for the year. There is also a fiscal year version of this report on the DonorQuest report menu.

01/26/2018 — Header - Comparison Of Month-To-Month Giving, Calendar Year 3 Years Ago — Page 1

Calendar 2015

All Constituents

Giving Entity	January	February	March	April	May	June	July	August	September	October	November	December	Total
Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2,000.00	0.00	0.00	0.00	0.00	2,000.00
Bach Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Baker, Thomas	1,100.00	100.00	100.00	0.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	0.00	2,000.00
Bowie, Denise	5,000.00	0.00	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,500.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
The Corporation For Public Bro	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Decca Records	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Foster, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Northern Songs Limited, (U.S.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	70,000.00	0.00	0.00	70,000.00
IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hayward, Justin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,500.00	0.00	0.00	0.00	7,500.00
Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Knight, Paula	5,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,000.00
Koneig, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lennon, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lodge, John	5,000.00	0.00	0.00	700.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,700.00
1984 Productions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musk, Elon	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Schmidt Aeronautic Foundatio	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Smith, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waters, Roger	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	16,100.00	100.00	600.00	700.00	100.00	100.00	100.00	2,100.00	7,600.00	70,100.00	100.00	0.00	97,700.00

Report Menu Name

Header - Comparison Of Month-To-Month Giving, Current Calendar Year

Description

Designed to be used with a Header-based Selection Result, this report layout will show a comparison of the total monetary giving by each constituent for each month of the year, for the current calendar year, plus a total for the year. Normally this report would be used with a selection of donors who have given in the current year. There is also a fiscal year version of this report on the DonorQuest report menu. As you can see, only one donor in our sample database had given so far in 2018:

01/26/2018 Header - Comparison Of Month-To-Month Giving, Current Calendar Year Page 1
Calendar 2018
All Constituents

Giving Entity	January	February	March	April	May	June	July	August	September	October	November	December	Total
Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bach Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Baker, Thomas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bowie, Denise	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
The Corporation For Public Bro	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Decca Records	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00
Foster, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Northern Songs Limited, (U.S.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hayward, Justin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Knight, Paula	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Koneig, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lennon, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lodge, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1984 Productions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musk, Elon	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Schmidt Aeronautic Foundatio	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Smith, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Waters, Roger	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00

Report Menu Name

Header - Comparison Of Month-To-Month Giving, Current Calendar Year With Donor ID

Description

Basically the same as the, "Header - Comparison Of Month-To-Month Giving, Current Calendar Year" report, this report includes the Donor ID as the first column.

01/26/2018 Header - Comparison Of Month-To-Month Giving, Current Calendar Year With Donor ID Page 1

Calendar 2018

All Constituents

ID	Giving Entity	January	February	March	April	May	June	July	August	September	October	November	December	Total
32	Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
28	Bach Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
18	Bowie, Denise	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1	Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Bro	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
11	Decca Records	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00
17	Foster, James	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
29	Northern Songs Limited, (U.S.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
10	Waters, Roger	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50.00

Report Menu Name

Header - Comparison Of Total Giving In 365-Day Periods Starting From Today Going Back

Description

Designed to be used with a Header-based Selection Result, this report layout will compare 365-day periods based on the current date. Five periods are compared. These are not calendar or fiscal years, but rather 365-day periods, so the totals on the report will change from day-to-day.

01/26/2018 **Header - Comparison Of Total Giving In 365-Day Periods Starting From Today Going Back** Page 1

Universal Qualification

ID Num	Giving Entity	1 To 365 Days Ago	366 To 730 Days Ago	731 To 1095 Days Ago	1096 To 1460 Days Ago	1461 To 1825 Days Ago
32	Intrepid Systems Inc.	1,200.00	5,000.00	2,000.00	1,000.00	1,400.00
28	Bach Memorial Account	500.00	0.00	0.00	0.00	250.00
15	Baker, Thomas	750.00	100.00	3,400.00	1,200.00	1,000.00
18	Bowie, Denise	8,450.00	0.00	500.00	5,000.00	7,000.00
1	Burke, James	800.00	500.00	0.00	1,000.00	8,800.00
20	Burke, James	0.00	0.00	0.00	600.00	2,944.00
27	The Corporation For Public Broadcasting	50,000.00	0.00	0.00	0.00	0.00
11	Decca Records	50.00	0.00	0.00	0.00	200.00
17	Foster, James	450.00	0.00	0.00	0.00	575.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	1,985.00
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	50,000.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00	13,579.67
12	Hayward, Justin	9,700.00	8,000.00	7,500.00	6,500.00	6,000.00
2	Progressive Music, Inc.	0.00	0.00	0.00	725.00	884.00
3	Trek Foundation	0.00	0.00	0.00	350.00	3,000.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,600.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	5,000.00	12,000.00
23	Lodge, John	0.00	0.00	700.00	12,500.00	0.00
6	1984 Productions	0.00	0.00	0.00	400.00	900.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	4,600.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
10	Waters, Roger	4,000.00	0.00	0.00	10,000.00	4,000.00
		75,900.00	122,200.00	84,100.00	99,275.00	71,717.67

Report Menu Name

Header - Comparison Of Year-To-Date Giving By Calendar Year

Description

Designed to be used with a Header-based Selection Result, this report layout will compare total giving by constituent for the current and past four years, as it was at the current point in time for each year. So for example, if the report is run on 01/26/2018, the yearly totals columns will show how much each constituent has given in total as of 01/26/2018, 01/26/2017, 01/26/2016, 01/26/2015, and 01/26/2014. So the report is specific down to the day for each year, based on the actual day you run the report.

01/26/2018 **Header - Comparison Of Year-To-Date Giving By Calendar Year** Page 1

Universal Qualification

ID Num	Giving Entity	2018	2017	2016	2015	2014
32	Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00
28	Bach Memorial Account	0.00	0.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	0.00	2,500.00	1,100.00	1,000.00
18	Bowie, Denise	0.00	0.00	0.00	5,000.00	0.00
1	Burke, James	0.00	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	0.00	0.00	0.00	0.00
11	Decca Records	50.00	0.00	0.00	0.00	0.00
17	Foster, James	0.00	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	560.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	5,000.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00	350.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
10	Waters, Roger	0.00	0.00	0.00	0.00	0.00
		50.00	600.00	2,500.00	16,100.00	4,410.00

Report Menu Name

Header - Comparison Of Year-To-Month Giving By Calendar Year

Description

Designed to be used with a Header-based Selection Result, this report layout will compare total giving by constituent for the current and past four years, as it was at the end of the current month for each year. So for example, if the report is run on 01/26/2018, the yearly totals columns will show how much each constituent has given in total as of 01/31/2018, 01/31/2017, 01/31/2016, 01/31/2015, and 01/31/2014. So this allows you to run the report at anytime during a month to get these snapshots in time for previous years, before moving on to the next month. The total for the current year will still change on a daily basis, as the month of the current year is never complete until the last day of the current month.

01/26/2018 **Header - Comparison Of Year-To-Month Giving By Calendar Year** **Page 1**

Universal Qualification

ID Num	Giving Entity	2018	2017	2016	2015	2014
32	Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00
28	Bach Memorial Account	0.00	0.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	0.00	2,500.00	1,100.00	1,000.00
18	Bowie, Denise	0.00	0.00	0.00	5,000.00	0.00
1	Burke, James	0.00	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	0.00	0.00	0.00	0.00
11	Decca Records	50.00	0.00	0.00	0.00	0.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	560.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	350.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	5,000.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00	350.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
10	Waters, Roger	0.00	0.00	0.00	0.00	0.00
		50.00	1,050.00	2,500.00	16,100.00	4,760.00

Report Menu Name

Header - Comparison Of Year-To-Year Giving By Calendar Year

Description

Designed to be used with a Header-based Selection Result, this report layout will show total monetary giving by constituent for the current and past four calendar years.

01/26/2018 **Header - Comparison Of Year-To-Year Giving By Calendar Year** Page 1

Universal Qualification

ID Num	Giving Entity	2018	2017	2016	2015	2014
32	Intrepid Systems Inc.	0.00	1,200.00	5,000.00	2,000.00	1,000.00
28	Bach Memorial Account	0.00	500.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	750.00	2,600.00	2,000.00	1,100.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00
1	Burke, James	0.00	800.00	500.00	0.00	1,000.00
20	Burke, James	0.00	0.00	0.00	0.00	600.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00
11	Decca Records	50.00	0.00	0.00	0.00	0.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	560.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	108,000.00	70,000.00	50,000.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	9,700.00	8,000.00	7,500.00	6,500.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	725.00
3	Trek Foundation	0.00	0.00	0.00	0.00	350.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00	5,000.00
23	Lodge, John	0.00	0.00	0.00	5,700.00	7,500.00
6	1984 Productions	0.00	0.00	0.00	0.00	750.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
10	Waters, Roger	0.00	4,000.00	0.00	0.00	10,000.00
		50.00	76,450.00	124,100.00	97,700.00	87,585.00

Report Menu Name

Header - Comparison Of Year-To-Year Giving By Calendar Year (10 Years)

Description

Designed to be used with a Header-based Selection Result, this report layout will show total monetary giving by constituent for the current and past nine calendar years, plus a column showing the ten year total for each constituent.

01/26/2018 **Header - Comparison Of Year-To-Year Giving By Calendar Year (10 Years)** Page 1

Universal Qualification

Giving Entity	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	Total
Intrepid Systems Inc.	0.00	1,200.00	5,000.00	2,000.00	1,000.00	1,400.00	3,000.00	5,000.00	4,000.00	2,500.00	1,500.00	26,600.00
Bach Memorial Account	0.00	500.00	0.00	0.00	0.00	750.00	0.00	0.00	0.00	0.00	0.00	1,250.00
Baker, Thomas	0.00	750.00	2,600.00	2,000.00	1,100.00	750.00	1,100.00	900.00	2,200.00	5,100.00	50.00	16,550.00
Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00	7,000.00	0.00	0.00	0.00	0.00	0.00	20,950.00
Burke, James	0.00	800.00	500.00	0.00	1,000.00	8,800.00	4,000.00	0.00	0.00	0.00	0.00	15,100.00
Burke, James	0.00	0.00	0.00	0.00	600.00	7,914.00	400.00	0.00	0.00	0.00	0.00	8,914.00
The Corporation For Publ	0.00	50,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50,000.00
Decca Records	50.00	0.00	0.00	0.00	0.00	200.00	600.00	0.00	0.00	0.00	0.00	850.00
Foster, James	0.00	450.00	0.00	0.00	0.00	575.00	100.00	500.00	0.00	0.00	0.00	1,625.00
Gore, Martin L.	0.00	0.00	0.00	0.00	560.00	1,425.00	175.00	0.00	0.00	0.00	0.00	2,160.00
Northern Songs Limited, (	0.00	0.00	108,000.00	70,000.00	50,000.00	0.00	40,000.00	30,000.00	20,000.00	500.00	15,000.00	333,500.00
IBM Corporation	0.00	0.00	0.00	0.00	0.00	13,579.67	1,234.56	0.00	0.00	0.00	0.00	14,814.23
Hayward, Justin	0.00	9,700.00	8,000.00	7,500.00	6,500.00	6,000.00	5,000.00	1,000.00	1,000.00	9,700.00	2,000.00	56,400.00
Progressive Music, Inc.	0.00	0.00	0.00	0.00	725.00	884.00	1,287.00	0.00	0.00	0.00	0.00	2,896.00
Trek Foundation	0.00	0.00	0.00	0.00	350.00	3,000.00	7,450.00	400.00	0.00	0.00	0.00	11,200.00
Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00	1,100.00	1,100.00	750.00	600.00	400.00	200.00	11,650.00
Koneig, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lennon, John	0.00	0.00	0.00	0.00	5,000.00	12,000.00	0.00	0.00	0.00	0.00	0.00	17,000.00
Lodge, John	0.00	0.00	0.00	5,700.00	7,500.00	0.00	300.00	0.00	0.00	0.00	0.00	13,500.00
1984 Productions	0.00	0.00	0.00	0.00	750.00	550.00	0.00	700.00	0.00	0.00	0.00	2,000.00
Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musk, Elon	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Schmidt Aeronautic Foun	0.00	600.00	0.00	0.00	0.00	4,600.00	1,000.00	500.00	0.00	0.00	0.00	6,700.00
Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	0.00	0.00	1,000.00
Smith, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00	0.00	0.00	200.00
Waters, Roger	0.00	4,000.00	0.00	0.00	10,000.00	4,750.00	1,500.00	0.00	0.00	0.00	0.00	20,250.00
	50.00	76,450.00	124,100.00	97,700.00	87,585.00	75,277.67	68,246.56	39,750.00	29,000.00	18,200.00	18,750.00	635,109.23

Report Menu Name

Header - Comparison Of Year-To-Year Giving By Calendar Year, Volunteer Hours Only

Description

Designed to be used with a Header-based Selection Result, this report layout will show total giving of volunteer hours for the current and past four calendar years. Donations of hours must have a Donation Type code of HR. Normally this report would only be used with a selection of donors who have donated time in the past four or five years. As you can see, our sample database does not have any donations of hours:

01/26/2018 **Header - Comparison Of Year-To-Year Giving By Calendar Year, Volunteer Hours Only** **Page 1**

Universal Qualification

ID Num	Giving Entity	2018	2017	2016	2015	2014
32	Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00
28	Bach Memorial Account	0.00	0.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	0.00	0.00	0.00	0.00
18	Bowie, Denise	0.00	0.00	0.00	0.00	0.00
1	Burke, James	0.00	0.00	0.00	0.00	0.00
20	Burke, James	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	0.00	0.00	0.00	0.00
11	Decca Records	0.00	0.00	0.00	0.00	0.00
17	Foster, James	0.00	0.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	0.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	0.00	0.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	0.00	0.00	0.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	0.00
21	Knight, Paula	0.00	0.00	0.00	0.00	0.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	0.00	0.00
23	Lodge, John	0.00	0.00	0.00	0.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	0.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	8.00
10	Waters, Roger	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	8.00

Report Menu Name

Header - Comparison Of Year-To-Year Giving By Fiscal Year

Description

Designed to be used with a Header-based Selection Result, this report layout will show total monetary giving by constituent for the current and past four fiscal years.

01/26/2018 **Header - Comparison Of Year-To-Year Giving By Fiscal Year** Page 1

Universal Qualification

ID Num	Giving Entity	2018	2017	2016	2015	2014
32	Intrepid Systems Inc.	0.00	6,200.00	2,000.00	0.00	1,000.00
28	Bach Memorial Account	0.00	500.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	750.00	3,100.00	1,600.00	1,000.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00
1	Burke, James	800.00	0.00	500.00	0.00	5,800.00
20	Burke, James	0.00	0.00	0.00	0.00	2,282.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00
11	Decca Records	50.00	0.00	0.00	0.00	200.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	760.00
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	50,000.00	0.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
12	Hayward, Justin	0.00	17,700.00	7,500.00	6,500.00	6,000.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	1,609.00
3	Trek Foundation	0.00	0.00	0.00	0.00	1,850.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,600.00
19	Koneig, John	0.00	0.00	0.00	0.00	0.00
13	Lennon, John	0.00	0.00	0.00	5,000.00	12,000.00
23	Lodge, John	0.00	0.00	0.00	13,200.00	0.00
6	1984 Productions	0.00	0.00	0.00	0.00	1,300.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	0.00	0.00	0.00	0.00	0.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	600.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
10	Waters, Roger	0.00	4,000.00	0.00	10,000.00	0.00
		850.00	196,650.00	83,100.00	96,800.00	37,001.00

Report Menu Name

Header - Complete Information On Each Donor

Description

Designed to be used with a Header-based Selection Result, this report layout will show pretty much everything known about each constituent. It may take several pages per constituent, so it can very easily become a very lengthy report, burning up a lot of paper! Typically it is used with a small selection of donors you need to have complete information printed for. It is also typically used to print the currently displayed donor account when the DonorQuest Main Information window is open. This can be done my clicking on the Print icon on the DonorQuest toolbar, setting an optional title line for the report, then choosing this report from the DonorQuest report menu.

01/26/2018 **Header - Complete Information On Each Donor** **Page 1**

Universal Qualification

MISC	PRIMARY	PRI CONTACT INFO	SECONDARY	SEC CONTACT INFO
ID: 32	Mr. Brad Allen Anderson Jr.	H: (800) 555-1212	Mrs. Samantha Lynn Keller	H:
Type: Church	Intrepid Systems Inc.	W: (800) 952-8228	Other: Sam	W:
Added: 07/15/1998	Software Engineer	M:	Sex: Female	M:
Modified: 01/14/2018	Other: Bradly	F: (800) 533-9218	Birthday: 02/05/1964	F:
By User: Patrick	Gender: Male	Brad@donorquest.com	Age: 53	sam@donorquest.com
	Marital Status: Married	www.donorquest.com	SSN: 988-76-6545	
	Anniversary: 06/15/1990	Acknowledge: No	SO	
	Birthday: 04/27/1964			
	Age: 53			
	SSN: 123-34-5678			

SALUTATIONS	ADDRESS	EXTRA ADDRESS
Sal1: Mr. Brad Anderson, Jr. and Mrs. Samantha Keller	701 Galer St.	2601 Elliott Ave
Sal2: Brad and Samantha	Seattle, WA 98109	Suite 3109
Sal3:	County: King	Seattle, WA 98121
	USA	Summer Home
	Addr Type: Home	Start: 01/01/2002
	Bad Addr? N	End: 06/30/2002

PROFILES	EDUCATION	LISTS	CONSTITUENCY	CY	TOTALS	OTHER	TOTALS
Interest: Travel	School: San Jose Stat	Board Member List	Do Not Solicit? N	2018:	$0.00	Greatest Gift:	$5,000.00
Interest: Golf	Degree: Bachelor of S	Volunteer List	Spr: Y Hol: Y News: Y	2017:	$1,200.00	Average Gift:	$1,358.33
Interest: Fundraising	Major: Computer Scien	Appropriations Commit	Solicitor: Patrick	2016:	$5,000.00	Lifetime Total:	$32,600.00
Interest: Clean Air	Grad Date: 05/01/1989	Steering Committee	Income: $65,000.00	2015:	$2,000.00	Donation Count:	24
	GPA: 3.75		Target: $50,001-Unlimi			Pledge Count:	5
			Rank: Major Donor				
			Code: Source: Referral				
			Club: Gold Club				

DONATIONS

DATE	AMOUNT	TYPE	ACCOUNT	STIMULUS	FUND	TY LETTER	TY VALUE	CHECK#	COMMENT
04/25/2017	100.00	CK	123-45-456	17AC	1000	T1	0.00	123456	General Commen
04/25/2017	100.00	CK	123-45-456	17AC	1000	BASICTHA	0.00	123456	General commen
03/04/2017	1,000.00	CA	123-45-456	17AC	1000	T1	0.00		General Commen
11/15/2016	5,000.00	CA	123-45-456	16AC	1000	T1	0.00		
08/31/2015	2,000.00	CA	123-45-456	15AC	1000	T1	0.00		General commen
05/29/2014	1,000.00	CA	123-45-456	14AC	1000	T1	0.00		
02/19/2013	1,400.00	CA	123-45-456	13AC	1000	T1	0.00		Any general com
08/26/2012	3,000.00	CA	123-45-456	12AC	1000	T1	0.00		Any general com
05/12/2011	2,000.00	AE	100-4010-7001-7	11AC	1000	T1	0.00	12345	Example donatio
02/18/2011	1,500.00	AE	123-45-456	11AC	1000	T1	0.00		Comment for Bra
01/25/2011	1,500.00	CK	123-45-456	11AC	1000	T1	0.00	9898	
03/26/2010	4,000.00	AE	123-45-456	10AC	1000	T1	0.00		
11/17/2009	2,500.00	AE	123-45-456	09AC	1000	T1	0.00		
12/02/2008	1,500.00	CK	123-45-456	08AC	1000	T1	0.00	4324	
02/20/2007	900.00	CA	123-45-456	07AC	1000	T1	0.00		
12/23/2006	500.00	CK	123-45-456	06AC	1000	T1	0.00		Soft Credit to Bak
01/24/2005	1,500.00	CK	123-45-456	05AC	1000	T1	0.00		
01/25/2004	1,000.00	CK	123-45-456	04AC	1000	T1	0.00		
01/25/2003	750.00	CK	123-45-456	03AC	1000	T1	0.00		
01/24/2002	600.00	CK	123-45-456	MUSIC	1000	T1	0.00		
02/28/2001	200.00	CK	123-45-456	01AC	1000	T1	0.00	345	
01/24/2001	400.00	CK	123-45-456	MUSIC	1000	T1	0.00		
02/28/1999	50.00	CK	123-45-456	MUSIC	1000	T1	0.00	1234	
01/25/1999	100.00	CK	123-45-456	MUSIC	1000	T1	0.00	4321	

PLEDGES

START	STOP	AMOUNT	PAY AMOUNT	PAY FREQ.	STIMULUS	TYPE	AMOUNT PAID	COMMENT
01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	
09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	
02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	
05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	Building fund founder
03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	

01/26/2018 **Header - Complete Information On Each Donor** **Page 2**

Universal Qualification

START	STOP	AMOUNT	PAY AMOUNT	PAY FREQ.	STIMULUS	TYPE	AMOUNT PAID	COMMENT

MEMOS

MEMO CODE	MEMO TEXT
ADDR3	3rd Address Line Can Go Here
CUSTOM	Memos can be used to add additional fields and information
S000001	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
TGERMANY	1973

LINKAGES

LINKED TO	LINKAGE
20: James Burke	FRIEND : Friend
24: IBM Corporation	MG50 : Matching Gift 50%

CONTACTS

DESCRIPTION	NEXT	LAST	STATUS	NOTES
Calling to invite Brad to our major donor thank-you dinner.	02/23/2018	02/15/2018	Open	02/15/2018: Called Brad but got his voicemail. Before transferring me the receptionist said this is a very busy week for him, but that things will be slowing down a lot next week. I left a message inviting him to our major donor thank-you dinner next Friday. I said that I understand he is very busy but we would love to have him and I'll check in one more time with him next week to see how things are going. I think it would be best to try him one more time on the 23rd, just a couple days before our dinner, so I will set my next contact date to the 23rd so DonorQuest will remind me when I come in that morning to give Brad another call.
Grant Request	02/15/2016	03/15/2016	Closed	
Follow up call	01/14/2015	01/07/2015	Closed	Spoke with Brad. He and his business partner will be attending the fundraiser in the spring.
Moves Management	08/17/2014	08/10/2014	Closed	Prospect seemed very open to helping with our mission in general. They might be in a posiiton to give us a rather large gift -- possibly a grant -- sometime in the near future -- maybe in a year or so.

NOTEPAD

Any miscellaneous notes can go here. Click on Window, Tile All Vertically at any time to optimize currently open windows for your screen resolution. Also try the Window, Tile Vertically With Main Window Priority view.

Report Menu Name

Header - Complete Information On Each Donor With Soft Credit Donations

Description

Same as the, "Header - Complete Information On Each Donor" report show above, but also includes any soft credit donations for each donor.

01/26/2018 **Header - Complete Information On Each Donor With Soft Credit Donations** Page 3
Universal Qualification

MISC	PRIMARY	PRI CONTACT INFO	SECONDARY	SEC CONTACT INFO
ID: 28 Type: Memorial Record Added: 02/12/1996 Modified: 03/31/2017 By User: Paul	Mr. Johann Sebastian Bach Bach Memorial Account Other: Gender: Male Marital Status: Anniversary: Birthday: 02/05/1970 Age: 47 SSN: 123-34-5678	H: (206) 270-1050 W: M: F: Johann@donorquest.com www.donorquest.com Acknowledge: No	Other: The Bach Family Sex: Birthday: Age: SSN:	H: W: M: F:

SALUTATIONS	ADDRESS	EXTRA ADDRESS
Sal1: Mr. Johann S. Bach Sal2: Johann Sal3:	3543 Brandenburg Way Seattle, WA 98109 County: King Addr Type: Home Bad Addr? N	

PROFILES	EDUCATION	LISTS	CONSTITUENCY	CY	TOTALS	OTHER	TOTALS
Interest: Music	School: Degree: Major: Grad Date: GPA:	Primary List	Do Not Solicit? Y Spr: N Hol: N News: N Solicitor: Income: $0.00 Target: Rank: Code: Club:	2018: 2017: 2016: 2015:	$0.00 $500.00 $0.00 $0.00	Greatest Gift: Average Gift: Lifetime Total: Donation Count: Pledge Count:	$500.00 $416.67 $1,250.00 3 1

DONATIONS

DATE	AMOUNT	TYPE	ACCOUNT	STIMULUS	FUND	APPEAL	TY	CREDIT FROM	COMMENT
04/15/2017	500.00	CA	123-50-937	17AC	2000	APPEAL1	T1	28	
02/04/2013	250.00	CA	123-45-456	13AC	1000	AM1	T1	28	
01/04/2013	500.00	CA	123-45-456	13AC	1000	AM1	T1	28	
01/23/2015	5,000.00	CA	123-70-MEM	UNSOL	5000		T1	23	Soft Credit to Bach Memorial
01/05/2015	5,000.00	CA	123-70-MEM	UNSOL	5000		TC	18	

PLEDGES

START	STOP	AMOUNT	PAY AMOUNT	PAY FREQ.	STIMULUS	TYPE	AMOUNT PAID	COMMENT
05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	

MEMOS

MEMO CODE	MEMO TEXT
S000001	01/30/2000; 00AC; AM1; First mailing for 00AC

LINKAGES

LINKED TO	LINKAGE

CONTACTS

DESCRIPTION	NEXT	LAST	STATUS	NOTES

01/26/2018 Header - Complete Information On Each Donor With Soft Credit Donations Page 4
Universal Qualification

NOTEPAD

One of the most profoundly inspired and masterful composers in history, Johann Sebastian Bach was born into a musical family in Eisenach, Thuringia - until recently part of East Germany. His father, Johann Ambrosius Bach, was a talented violinist, and taught his son the basic skills of string-playing; another relation, the organist at Eisenach's most important church, instructed the young boy on the organ.

Report Menu Name

Header - Constituent Name With Stored File List And Count

Description

DonorQuest has the capability of storing copies of external files of any type within a constituent's record for later viewing and retrieval. Designed to be used with a Header-based Selection Result, this report layout will show a list of the files currently stored for each constituent account, along with a file count for each constituent. Normally this report would be used with a selection of constituents with stored files, which can be created by running the pre-defined selection named, "Constituents With Any Stored Files."

01/26/2018 **Header - Constituent Name With Stored File List And Count** Page 1

Universal Qualification

Constituent Name	Stored File List	File Count
Intrepid Systems Inc.	Audio File of speech donor gave at city council meeting.mp3 ConstituentNotes.doc Main profile picture of donor.jpg Picture of donor at our top donor tribute dinner.JPG Scan of a letter donor sent us praising our work.pdf	5
Bach Memorial Account	ConstituentNotes.doc	1
Baker, Thomas		0
Bowie, Denise		0
Burke, James		0
Burke, James		0
The Corporation For Public Broadcasting		0
Decca Records		0
Foster, James		0
Gore, Martin L.		0
Northern Songs Limited, (U.S. Division)		0
IBM Corporation		0
Hayward, Justin		0
Progressive Music, Inc.		0
Trek Foundation		0
Knight, Paula		0
Koneig, John		0
Lennon, John		0
Lodge, John		0
1984 Productions		0
Mozart Memorial Account		0
Musk, Elon		0

Report Menu Name

Header - Contact Listing

Description

Designed to be used with a Header-based Selection Result, this report layout will show the primary and secondary contact information for each constituent, including spousal names for joint accounts or primary contact for an organization, primary mailing address, all telephone numbers, email addresses, and any website URL's. Note that this is not to be confused with reports showing Scheduled Contact records which are scheduled interactions between the constituents and staff members of your organization, of which each constituent may have an unlimited number.

01/26/2018 | **Header - Contact Listing** | Page 1

Universal Qualification

ID/Type	Name(s)	Address	Primary Telephones	Primary EMail/Web	Secondary Telephones	Secondary EMail/Web
ID: 32 Type: CHUR	Brad Anderson Samantha Keller Intrepid Systems Inc.	701 Galer St. Seattle WA 98109	H: (800) 555-1212 W: (800) 952-8228 M: F: (800) 533-9218	Brad@donorquest.com www.donorquest.com	H: W: M: F:	sam@donorquest.com
ID: 28 Type: M	Johann Bach Bach Memorial Account	3543 Brandenburg Way Seattle WA 98109	H: (206) 270-1050 W: M: F:	Johann@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 15 Type: I	Thomas Baker	4968 Tardis Ave. San Jose CA 95112-3211	H: (510) 356-7540 W: (123) 456-7890 X1234 M: F:	Thomas@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 18 Type: I	Denise Bowie	123 First Avenue Apt 200 San Jose CA 95119-2312	H: (408) 555-1212 W: M: F:	Denise@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 1 Type: I	James Burke	826 Connections Way Palo Alto CA 94304-7899	H: (510) 328-2028 W: M: F:	James@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 20 Type: I	James Burke	826 Connections Way Palo Alto CA 94304-7899	H: (415) 555-1212 W: M: F:	James@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 27 Type: C	James Burke The Corporation For Public Broad	1105 Information Avenue San Francisco CA 94175	H: ( ) - W: (415) 555-1234 M: F:	James@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 11 Type: C	Peter Davidson Decca Records	3775 Galafrey Way Palo Alto CA 94300-2112	H: (415) 555-1212 W: M: F:	Peter@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 17 Type: I	James Foster	14552 Medical Dr. Saratoga CA 95070-3212	H: (510) 213-2132 W: M: F:	James@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 4 Type: I	Martin L. Gore	Stanford OPA Bldg. Eugene OR 97401	H: (415) 555-1212 W: M: F:	Martin L.@donorquest.com www.donorquest.com	H: W: M: F:	
ID: 29 Type: C	George Harrison Northern Songs Limited, (U.S. Divi	234 Abbey Road San Francisco CA 94161-2323	H: W: (510) 213-2132 M:	George@donorquest.com www.donorquest.com	H: W: M:	

Report Menu Name

Header - Count Of Counties And States With Percentages

Description

Designed to be used either with a Header-based Selection Result or run directly, this report layout will show a count of the number of constituents in each county, and the percentage of all constituents on the report they comprise. The State for each county is also shown. Since this is a summary report you may run it directly outside of a Selection Result if you wish these statistic for your entire database. But more commonly you will likely run it on a subset of your database via a Selection Result.

01/26/2018 **Header - Count Of Counties And States With Percentages** **Page 1**

Universal Qualification

County	State	Count	Percentage
Alameda	CA	1	3.85
King	WA	4	15.38
Lane	OR	1	3.85
Palo Alto	CA	1	3.85
San Diego	CA	1	3.85
San Francisco	CA	3	11.54
San Mateo	CA	2	7.69
Santa Clara	CA	10	38.46
Schenectady	NY	1	3.85
Siskiyou	CA	1	3.85
Sutter	CA	1	3.85
		26	100.00

Report Menu Name

Header - Count Of Counties With Percentages

Description

This is just like the, "Header - Count Of Counties And States With Percentages" report shown above, without the State column.

02/22/2018 **Header - Count Of Counties With Percentages** Page 1

All Constituents

County	Count	Percentage
Alameda	1	3.85
King	4	15.38
Lane	1	3.85
Palo Alto	1	3.85
San Diego	1	3.85
San Francisco	3	11.54
San Mateo	2	7.69
Santa Clara	10	38.46
Schenectady	1	3.85
Siskiyou	1	3.85
Sutter	1	3.85
	26	100.00

Report Menu Name

Header - Count Of Donor Types

Description

This report layout will show a count of Donor Types. Since it is a summary report, you may run it directly to see the counts for your entire database, or with a header-based selection result.

01/26/2018 **Header - Count Of Donor Types** **Page 1**

Universal Qualification

Donor Type	Description	Count
C	Corporation	5
CHURCH	Church	1
F	Foundation	2
I	Individual	14
M	Memorial Record	2
O	Organization	2
		26

Report Menu Name

Header - Count Of Donor Types With Percentages

Description

This report layout will show a count of Donor Types and the percentage of the whole each count represents. Since it is a summary report, you may run it directly to see the counts for your entire database, or with a header-based selection result.

02/23/2018 **Header - Count Of Donor Types With Percentages** Page 1

All Constituents

Donor Type	Description	Count	Percentage
C	Corporation	6	24.0
F	Foundation	2	8.0
I	Individual	13	52.0
M	Memorial Record	2	8.0
O	Organization	2	8.0
		25	100.0

Report Menu Name

Header - Count Of States With Percentages

Description

This report layout will show a count of States and the percentage of the whole each count represents. Since it is a summary report, you may run it directly to see the counts for your entire database, or with a header-based selection result.

02/23/2018 **Header - Count Of States With Percentages** **Page 1**

All Constituents

State	Count	Percentage
CA	19	76.0
NY	1	4.0
OR	1	4.0
WA	4	16.0
	25	100.0

Report Menu Name

Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease With Detail

Description

Designed to be used with a Header-based Selection Result, this report layout will show constituent ID and names, along with the percentage increase (or decrease) in their giving between the current and previous calendar year. The detail of the donations comprising the yearly totals is also shown. This report really only becomes meaningful when run later in the current year to monitor progress in meeting or exceeding the previous year's performance. To get the same comparison for the previous two years, you should instead run the report named, "Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail." There is also a Fiscal Year version of this report on the DonorQuest report menu.

02/04/2018 | **Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease With Detail** | **Page 1**

Donors With Giving In FY 17 or FY 18

ID	Giving Entity	Date	Amount	2017 Calendar Total	2018 Calendar Total	Increase/Decrease	Lifetime Total
29	Northern Songs Limited, (U.S. Division)			0.00	0.00	0.00	343,500.00
17	Foster, James	01/30/2017	450.00	450.00	0.00	-450.00	1,625.00
28	Bach Memorial Account	04/15/2017	500.00	500.00	0.00	-500.00	1,250.00
7	Schmidt Aeronautic Foundation	01/05/2017	600.00	600.00	0.00	-600.00	6,700.00
32	Intrepid Systems Inc.	01/15/2018	500.00	1,200.00	500.00	-700.00	33,100.00
		04/25/2017	100.00				
		04/25/2017	100.00				
		03/04/2017	1,000.00				
15	Baker, Thomas	03/31/2017	750.00	750.00	0.00	-750.00	21,550.00
1	Burke, James	12/31/2017	800.00	800.00	0.00	-800.00	15,100.00
10	Waters, Roger	03/31/2017	4,000.00	4,000.00	0.00	-4,000.00	20,250.00
18	Bowie, Denise	03/31/2017	8,450.00	8,450.00	0.00	-8,450.00	20,950.00
12	Hayward, Justin	03/26/2017	9,700.00	9,700.00	0.00	-9,700.00	94,010.00
53	Musk, Elon	12/15/2017	10,000.00	17,000.00	0.00	-17,000.00	39,000.00
		03/10/2017	7,000.00				
27	The Corporation For Public Broadcasting	03/31/2017	50,000.00	50,000.00	0.00	-50,000.00	50,000.00
			93,950.00	93,450.00	500.00	-92,950.00	647,035.00

Report Menu Name

Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease, With Counts

Description

Designed to be used with a Header-based Selection Result, this report layout will show constituent ID and names, along with the percentage increase (or decrease) in their giving between the current and previous calendar year. This report also has columns to count the number of donors seeing an increase, staying the same, and decreasing in their giving between the two years. The totals for these columns are what matter, allowing you to see the overall trend for the two years. Each donor's lifetime giving total is also shown for reference. This report really only becomes meaningful when run later in the current year to monitor progress in meeting or exceeding the previous year's performance. To get the same comparison for the previous two years, you should instead run the report named, "Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease, With Counts." There is also a Fiscal Year version of this report on the DonorQuest report menu.

02/04/2018 **Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease, With Counts** Page 1

Donors With Giving In FY 17 or FY 18

ID	Giving Entity	2017 Calendar Total	2018 Calendar Total	Increase/Decrease	Increase	Same	Decrease	Lifetime Total
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	0.00	0	1	0	343,500.00
17	Foster, James	450.00	0.00	-450.00	0	0	1	1,625.00
28	Bach Memorial Account	500.00	0.00	-500.00	0	0	1	1,250.00
7	Schmidt Aeronautic Foundation	600.00	0.00	-600.00	0	0	1	6,700.00
32	Intrepid Systems Inc.	1,200.00	500.00	-700.00	0	0	1	33,100.00
15	Baker, Thomas	750.00	0.00	-750.00	0	0	1	21,550.00
1	Burke, James	800.00	0.00	-800.00	0	0	1	15,100.00
10	Waters, Roger	4,000.00	0.00	-4,000.00	0	0	1	20,250.00
18	Bowie, Denise	8,450.00	0.00	-8,450.00	0	0	1	20,950.00
12	Hayward, Justin	9,700.00	0.00	-9,700.00	0	0	1	94,010.00
53	Musk, Elon	17,000.00	0.00	-17,000.00	0	0	1	39,000.00
27	The Corporation For Public Broadcasting	50,000.00	0.00	-50,000.00	0	0	1	50,000.00
		93,450.00	500.00	-92,950.00	0	1	11	647,035.00

Report Menu Name

Header - Current And Previous Calendar Year Donations, Sorted By Zip With Detail

Description

This report is essentially the same layout as the, "Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease With Detail" report, but includes a Zip code column, and is ordered by zip code. There is also a Fiscal Year version of this report on the DonorQuest report menu.

02/04/2018 Header - Current And Previous Calendar Year Donations, Sorted By Zip With Detail Page 1

Donors With Giving In FY 17 or FY 18

Zip	ID	Giving Entity	Date	Amount	2017 Calendar Total	2018 Calendar Total	Increase/Decrease	Lifetime Total
94161-2323	29	Northern Songs Limited, (U.S. Division)			0.00	0.00	0.00	343,500.00
94175	27	The Corporation For Public Broadcasting	03/31/2017	50,000.00	50,000.00	0.00	-50,000.00	50,000.00
94304-7899	1	Burke, James	12/31/2017	800.00	800.00	0.00	-800.00	15,100.00
94403	10	Waters, Roger	03/31/2017	4,000.00	4,000.00	0.00	-4,000.00	20,250.00
94538	53	Musk, Elon	12/15/2017	10,000.00	17,000.00	0.00	-17,000.00	39,000.00
			03/10/2017	7,000.00				
95070-1234	7	Schmidt Aeronautic Foundation	01/05/2017	600.00	600.00	0.00	-600.00	6,700.00
95070-3212	17	Foster, James	01/30/2017	450.00	450.00	0.00	-450.00	1,625.00
95112-3211	15	Baker, Thomas	03/31/2017	750.00	750.00	0.00	-750.00	21,550.00
95119-2312	18	Bowie, Denise	03/31/2017	8,450.00	8,450.00	0.00	-8,450.00	20,950.00
98109	32	Intrepid Systems Inc.	01/15/2018	500.00	1,200.00	500.00	-700.00	33,100.00
			04/25/2017	100.00				
			04/25/2017	100.00				
			03/04/2017	1,000.00				
98109	28	Bach Memorial Account	04/15/2017	500.00	500.00	0.00	-500.00	1,250.00
98109	12	Hayward, Justin	03/26/2017	9,700.00	9,700.00	0.00	-9,700.00	94,010.00
				93,950.00	93,450.00	500.00	-92,950.00	647,035.00

Report Menu Name

Header - Demographic Report, Individual Donors Only

Description

Designed to be used with a Header-based Selection Result, this report layout will show each constituent's ID, name, gender, birthday, age, marital status, degree, job title, annual income, and target annual ask revenue.

01/26/2018 **Header - Demographic Report, Individual Donors Only** Page 1

Universal Qualification

ID	Name	Gender	Birthday	Age	Marital Status	Degree	Job Title	Annual Income	Target
15	Baker, Thomas	Male	02/05/1945	72				60,000.00	$10,001-$20,000
18	Bowie, Denise	Female	02/05/1970	47	Single			90,000.00	$10,001-$20,000
1	Burke, James	Male	02/05/1970	47				70,000.00	$5001-$10,000
20	Burke, James	Male	06/05/1970	47				80,000.00	$10,001-$20,000
17	Foster, James	Male	02/05/1970	47				0.00	$20,001-$50,000
4	Gore, Martin L.	Male	05/05/1970	47				140,000.00	$50,001-Unlimited
12	Hayward, Justin	Male	02/05/1945	72		Master of Arts		120,000.00	$50,001-Unlimited
21	Knight, Paula	Female	06/05/1970	47				98,765.00	$10,001-$20,000
13	Lennon, John	Male	10/09/1940	77				0.00	
23	Lodge, John	Male	03/05/1945	72		Master of Arts		50,000.00	$1-$5000
53	Musk, Elon	Male	06/28/1971	46				0.00	
8	Scott, Montgomery	Male	02/05/1970	47				900,000.00	$50,001-Unlimited
26	Smith, John	Male	07/05/1970	47				100,000.00	$50,001-Unlimited
10	Waters, Roger	Male	09/05/1970	47				0.00	

Report Menu Name

Header - Donation And Pledge History Combined

Description

Designed to be used with a Header-based Selection Result, this report layout will show all pledges for each constituent along with the payments made toward each pledge. Since pledge payments are simply donations applied as payments toward specific pledges, this report shows only the donations linked as payments. Also shown are the constituent ID, Name, Organization Name (if an organizational donor), and full Address. If run directly (outside of a selection), this report will automatically run its own selection for all donors with any outstanding pledges.

02/23/2018 Header - Donation And Pledge History Combined Page 21

TAKEN FROM: All Constituents

ID	Last Name	First Name	Organization Name	Address	City	State	Zip
53	Musk	Elon	SpaceX	3141 Tesla Ave.	Fremont	CA	94538

DONATIONS

DATE	AMOUNT	TYPE	ACCOUNT	STIMULUS	FUND	TY LETTER	TY VALUE	CHECK#	COMMENT
01/15/2018	1,000.00	CK	123-45-457	SE	STEMSTUD	T1	0.00	1125	
12/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	T1	0.00	1124	
11/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	T1	0.00	1123	
10/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	T1	0.00	1122	

PLEDGES

START	STOP	AMOUNT	PAY AMOUNT	PAY FREQUENCY	STIMULUS	TYPE	AMOUNT PAID	COMMENT
02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	Funding Migration from Wind
02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	Funding Electric Vehicles
02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	Automating our warehouse
02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	Support for music education
10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	Support for science education

Report Menu Name

Header - Donation And Pledge History Combined, Version 2

Description

This report has all of the information provided on the, "Header - Donation And Pledge History Combined" report, but also includes more biographical information about the primary and secondary names on each constituent account. If run directly (outside of a selection), this report will automatically run its own selection for all donors with any outstanding pledges.

01/26/2018 | **Header - Donation And Pledge History Combined, Version 2** | Page 1

TAKEN FROM: Universal Qualification

MISC	PRIMARY	PRI CONTACT INFO	SECONDARY	SEC CONTACT INFO
ID: 32 Type: Church Added: 07/15/1998 Modified: 01/14/2018 By User: Patrick	Mr. Brad Allen Anderson Jr. Intrepid Systems Inc. Software Engineer Other: Bradly Gender: Male Marital Status: Married Anniversary: 06/15/1990 Birthday: 04/27/1964 Age: 53 SSN: 123-34-5678	H: (800) 555-1212 W: (800) 952-8228 M: F: (800) 533-9218 Brad@donorquest.com www.donorquest.com	Mrs. Samantha Lynn Keller Other: Sam Sex: Female Birthday: 02/05/1964 Age: 53 SSN: 988-76-6545	H: W: M: F: sam@donorquest.com

SALUTATIONS	ADDRESS	EXTRA ADDRESS
Sal1: Mr. Brad Anderson, Jr. and Mrs. Samantha Keller Sal2: Brad and Samantha Sal3:	701 Galer St. Seattle, WA 98109 USA Addr Type: Home Bad Addr? N	2601 Elliott Ave Suite 3109 Seattle, WA 98121 Summer Home Start: 01/01/2002 End: 06/30/2002

ALL PLEDGE PAYMENTS (Entered as Donations)

DATE	AMOUNT	TYPE	ACCOUNT	STIMULUS	FUND	TY LETTER	TY VALUE	CHECK#	COMMENT

ALL PLEDGES

START	STOP	AMOUNT	PAY AMOUNT	PAY FREQ	STIMULUS	TYPE	AMOUNT PAID	WRITE OFF	COMMENT
01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	No	
09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	No	
02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	No	
05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	No	Building fund founder
03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	No	

Total Pledged:	30,950.69
Total Paid:	0.00
Balance:	30,950.69

Report Menu Name

Header - Donation History Report, All Donations

Description

Designed to be used with a Header-based Selection Result, this report layout will show all hard donations for each constituent, with non-monetary amounts and counts shown in separate columns. Note that if what you're trying to do is print a donation report which has only donations meeting certain conditions (such as having been given in a specific range of time or for specific campaigns), then you should run a donation-based selection to select just the donations you want to report on, then use a donation-based report, such as the "Donation - Donation Detail Report." This report will always show all donations for each constituent, regardless of the conditions you may have used to select a group of constituents by.

01/26/2018 **Header - Donation History Report, All Donations** **Page 1**

Universal Qualification

ID	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
		04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BASIC	General comment goes here
		03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
		11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
		08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
		05/29/2014	1,000.00				CA	123-45-456	14AC	1000	AM1	T1	
		02/19/2013	1,400.00				CA	123-45-456	13AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
		08/26/2012	3,000.00				CA	123-45-456	12AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
		05/12/2011	2,000.00				AE	100-4010-700	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
		02/18/2011	1,500.00				AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's donation
		01/25/2011	1,500.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
		03/26/2010	4,000.00				AE	123-45-456	10AC	1000		T1	
		11/17/2009	2,500.00				AE	123-45-456	09AC	1000		T1	
		12/02/2008	1,500.00				CK	123-45-456	08AC	1000	APPEAL1	T1	
		02/20/2007	900.00				CA	123-45-456	07AC	1000	APPEAL1	T1	
		12/23/2006	500.00				CK	123-45-456	06AC	1000		T1	Soft Credit to Baker
		01/24/2005	1,500.00				CK	123-45-456	05AC	1000		T1	
		01/25/2004	1,000.00				CK	123-45-456	04AC	1000		T1	
		01/25/2003	750.00				CK	123-45-456	03AC	1000		T1	
		01/24/2002	600.00				CK	123-45-456	MUSIC	1000		T1	
		02/28/2001	200.00				CK	123-45-456	01AC	1000		T1	
		01/24/2001	400.00				CK	123-45-456	MUSIC	1000		T1	
		02/28/1999	50.00				CK	123-45-456	MUSIC	1000		T1	
		01/25/1999	100.00				CK	123-45-456	MUSIC	1000		T1	
			32,600.00	24.00		0							
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
		02/04/2013	250.00				CA	123-45-456	13AC	1000	AM1	T1	
		01/04/2013	500.00				CA	123-45-456	13AC	1000	AM1	T1	
			1,250.00	3.00		0							

Report Menu Name

Header - Donation History Report, All Donations Including Soft Credit Donations

Description

Designed to be used with a Header-based Selection Result, this report layout will show all hard and soft credit donations for each constituent, with non-monetary amounts and counts shown in separate columns.

01/26/2018 **Header - Donation History Report, All Donations Including Soft Credit Donations** Page 1

Universal Qualification

Donor Account	Actual Giver	Soft Credit To	Date	Amount	Count	In-Kinds	Count	Type	Stimulus	Fund	Appeal	Comment
Intrepid Systems Inc.			04/25/2017	100.00				CK	17AC	1000	17ACA1	General Comment Goes Here
			04/25/2017	100.00				CK	17AC	1000	APPEAL1	General comment goes here
		Elon Musk	03/04/2017	1,000.00				CA	17AC	1000	APPEAL1	General Comment goes here
			11/15/2016	5,000.00				CA	16AC	1000	AM1	
			08/31/2015	2,000.00				CA	15AC	1000	AM1	General comment
			05/29/2014	1,000.00				CA	14AC	1000	AM1	
			02/19/2013	1,400.00				CA	13AC	1000	APPEAL1	Any general comment may be entered in the donation comment field
			08/26/2012	3,000.00				CA	12AC	1000	APPEAL1	Any general comment may be entered in the donation comment field
			05/12/2011	2,000.00				AE	11AC	1000	APPEAL2	Example donation for previous month's donations report
			02/18/2011	1,500.00				AE	11AC	1000		Comment for Brad Anderson's donation
		Thomas Baker	01/25/2011	1,500.00				CK	11AC	1000	APPEAL1	
			03/26/2010	4,000.00				AE	10AC	1000		
			11/17/2009	2,500.00				AE	09AC	1000		
			12/02/2008	1,500.00				CK	08AC	1000	APPEAL1	
			02/20/2007	900.00				CA	07AC	1000	APPEAL1	
		Thomas Baker	12/23/2006	500.00				CK	06AC	1000		Soft Credit to Baker
			01/24/2005	1,500.00				CK	05AC	1000		
			01/25/2004	1,000.00				CK	04AC	1000		
			01/25/2003	750.00				CK	03AC	1000		
			01/24/2002	600.00				CK	MUSIC	1000		
			02/28/2001	200.00				CK	01AC	1000		
			01/24/2001	400.00				CK	MUSIC	1000		
			02/28/1999	50.00				CK	MUSIC	1000		
			01/25/1999	100.00				CK	MUSIC	1000		
				32,600.00	24.00	0.00	0					
Bach Memorial Account			04/15/2017	500.00				CA	17AC	2000	APPEAL1	
			02/04/2013	250.00				CA	13AC	1000	AM1	
			01/04/2013	500.00				CA	13AC	1000	AM1	
	John Lodge		01/23/2015	5,000.00				CA	UNSOL	5000		Soft Credit to Bach Memorial
	Denise Bowie		01/05/2015	5,000.00				CA	UNSOL	5000		
				11,250.00	5.00	0.00	0					

Report Menu Name

Header - Donation History Report, All Donations Including Soft Credit Donations, Current/ Past FY

Description

Designed to be used with a Header-based Selection Result, this report layout will do its own filtering to show hard and soft donations for just the current and past fiscal year for each constituent. This filtering of donation by time is actually built into the report itself, so it will always have this behavior. So you would use the Selection process in DonorQuest to choose the specific constituents you wish to have on the report, and the report will take the additional step of filtering the donations shown by time. While you could create a custom version of this report to employ different donation filtering, if what you're trying to do is print a donation report which has only donations meeting certain conditions you would like to define on-the-fly, then you should run a donation-based selection to select just the donations you want to report on, then use a donation-based report, such as the "Donation - Donation Detail Report."

01/26/2018 **Header - Donation History Report, All Donations Including Soft Credit Donations** **Page 1**

Current/Past Fiscal Year Only

Universal Qualification

Donor Account	Actual Giver	Soft Credit To	Date	Amount	Count	In-Kinds	Count	Type	Stimulus	Fund	Appeal	Comment
Intrepid Systems Inc.			04/25/2017	100.00				CK	17AC	1000	17ACA1	General Comment Goes Here
			04/25/2017	100.00				CK	17AC	1000	APPEAL1	General comment goes here
		Elon Musk	03/04/2017	1,000.00				CA	17AC	1000	APPEAL1	General Comment goes here
			11/15/2016	5,000.00				CA	16AC	1000	AM1	
				6,200.00	4	0.00	0					
Bach Memorial Account			04/15/2017	500.00				CA	17AC	2000	APPEAL1	
				500.00	1	0.00	0					
Baker, Thomas			03/31/2017	750.00				CA	17AC	3000	APPEAL1	
				750.00	1	0.00	0					
Bowie, Denise			03/31/2017	8,450.00				CK	17AC	3000	APPEAL1	
				8,450.00	1	0.00	0					
Burke, James			12/31/2017	800.00				VC	17AC	1000		
				800.00	1	0.00	0					
Burke, James												
				0.00	0	0.00	0					
The Corporation For Public Bro			03/31/2017	50,000.00				CK	17AC	1000	APPEAL1	
				50,000.00	1	0.00	0					
Decca Records			01/07/2018	50.00								
				50.00	1	0.00	0					
Foster, James			01/30/2017	450.00				CK	17AC	1000	APPEAL1	
				450.00	1	0.00	0					
Gore, Martin L.												
				0.00	0	0.00	0					
Northern Songs Limited, (U.S.			11/20/2016	14,000.00				AE	16AC	1000		Sample donation for New Donor report
			11/03/2016	24,000.00				AE	16AC	1000		Sample donation for New Donor report
			11/02/2016	45,000.00				AE	16AC	1000		Sample donation for New Donor report
			11/01/2016	25,000.00				AE	16AC	1000		Sample donation for New Donor report

Report Menu Name

Header - Donation History Report, Hard And Soft Credit Donations For Specific Date Range

Description

Designed to be used with a Header-based Selection Result, this report layout serves more as a template for creating your own custom header-based report which you need to filter donations by time. The stock version of this report is set to use the date range 01/01/2010 to 01/01/2012. To change that, you would copy the stock report layout, then click on the Setup button on the DonorQuest report menu and change the two dates shown in the Initializations blank of the Options tab. Again, we need to emphasize that in the vast majority of cases when you need to limit donations shown on a report for each constituent, the best way to do that is to run a donation-based selection which does the donation filtering based on anything you could possibly think of, then use a donation-based version of this report, such as the, "Donations - Donation Detail Report." But using a Header-based donation report with a custom filter like this is certainly useful in situations in which you really want a header-based report, but only want to see certain donations on it. For example, a header-based donation report is able to show both hard and soft credit donations for each donor since it is able to "fetch" the soft credit donations from the actual constituent accounts they belong to on-the-fly as the report runs.

01/26/2018 **Header - Donation History Report, Hard And Soft Credit Donations For Specific Date Range** **Page 1**

Universal Qualification

Donor Account	Actual Giver	Soft Credit To	Date	Amount	Count	In-Kinds	Count	Type	Stimulus	Fund	Appeal	Comment
Intrepid Systems Inc.		Elon Musk										
			05/12/2011	2,000.00				AE	11AC	1000	APPEAL2	Example donation for previous month's donations report
			02/18/2011	1,500.00				AE	11AC	1000		Comment for Brad Anderson's donation
		Thomas Baker	01/25/2011	1,500.00				CK	11AC	1000	APPEAL1	
			03/26/2010	4,000.00				AE	10AC	1000		
		Thomas Baker										
				9,000.00	4.00	0.00	0					
Bach Memorial Account	John Lodge											
	Denise Bowie											
				0.00	0	0.00	0					
Baker, Thomas			10/20/2011			20.00		HR	11AC	1000	APPEAL2	
			09/30/2011	200.00				AE	11AC	1000	APPEAL2	
			05/27/2011	300.00				AE	11AC	1000	APPEAL2	
			01/22/2011	400.00				CK	UNSOL	1000		
			11/20/2010	2,000.00				CK	10AC	1000	APPEAL1	
			01/22/2010	200.00				CK	UNSOL	1000		
	Trek Foundation											
	IBM Corporation											
	Intrepid Systems Inc.		01/25/2011	1,500.00				CK	11AC	1000	APPEAL1	
	Intrepid Systems Inc.											
				4,600.00	6.00	20.00	1.00					
Bowie, Denise		Bach Memorial Acco										
				0.00	0	0.00	0					
Burke, James												
				0.00	0	0.00	0					
Burke, James												
				0.00	0	0.00	0					
The Corporation For Public Bro												
				0.00	0	0.00	0					
Decca Records												
				0.00	0	0.00	0					

Report Menu Name

Header - Donation History Report, Soft Credit Donations Received Only

Description

Designed to be used with a Header-based Selection Result, this report layout will only show the soft credit donations (if any) for each constituent. This report will automatically omit any constituent who have no soft credit donations. Included in the report are columns for both the constituent receiving the soft credit, and the actual giver.

01/26/2018 **Header - Donation History Report, Soft Credit Donations Received Only** **Page 1**

Universal Qualification

ID	Donor Account	Actual Giver	Date	Amount	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
28	Bach Memorial Account	John Lodge	01/23/2015	5,000.00		CA	123-70-ME	UNSOL	5000		T1	Soft Credit to Bach Memorial
		Denise Bowie	01/05/2015	5,000.00		CA	123-70-ME	UNSOL	5000		TC	
				10,000.00	2							
15	Baker, Thomas	Trek Foundation	01/31/2014	350.00		CK	123-50-937	14AC	3000		T1	Example of soft credit donation
		IBM Corporation	04/04/2013	12,345.67		CK	123-60-932	13AC	1000		T1	
		Intrepid Systems Inc.	01/25/2011	1,500.00		CK	123-45-456	11AC	1000	APPEAL1	T1	
		Intrepid Systems Inc.	12/23/2006	500.00		CK	123-45-456	06AC	1000		T1	Soft Credit to Baker
				14,695.67	4							
5	Mozart Memorial Account	Roger Waters	11/24/2014	10,000.00		CA	123-50-937	UNSOL	5000		TC	Given in Honor of Mozart on his birthday.
		John Lodge	11/24/2014	7,500.00		VC		UNSOL	5000		T1	Given in Honor of Mozart on his birthday
				17,500.00	2							
53	Musk, Elon	Intrepid Systems Inc.	03/04/2017	1,000.00		CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
				1,000.00	1							
				43,195.67	9							

RECORDS PROCESSED: 26

RECORDS PRINTED: 4

[Selection 2 - January 25, 2018 - 10:08:14]

Report Menu Name

Header - Donation History Report, With Address, 2 Most Recent Donations Only

Description

Designed to be used with a Header-based Selection Result, this report layout will show the full name and address of each constituent in a mailing label-style vertical format, and the two most recent donations.

01/26/2018 | **Header - Donation History Report, With Address, 2 Most Recent Donations Only** | Page 1

Universal Qualification

ID	Name/Address	Date	Amount	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
32	Anderson, Brad	04/25/2017	100.00		CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
	Intrepid Systems Inc.	04/25/2017	100.00		CK	123-45-456	17AC	1000	APPEAL1	BASIC	General comment goes here
	701 Galer St.										
	Seattle, WA 98109										
			200.00	2.00							
28	Bach, Johann	04/15/2017	500.00		CA	123-50-937	17AC	2000	APPEAL1	T1	
	Bach Memorial Account	02/04/2013	250.00		CA	123-45-456	13AC	1000	AM1	T1	
	3543 Brandenburg Way										
	Seattle, WA 98109										
			750.00	2.00							
15	Baker, Thomas	03/31/2017	750.00		CA	123-45-678	17AC	3000	APPEAL1	T1	
	4968 Tardis Ave.	05/10/2016	100.00		CK	123-50-937	16AC	1000		T1	
	San Jose, CA 95112-3211										
			850.00	2.00							
18	Bowie, Denise	03/31/2017	8,450.00		CK	123-60-932	17AC	3000	APPEAL1	T1	
	123 First Avenue	03/09/2015	500.00		CK	123-60-932	15AC	3000		T1	
	Apt 200										
	San Jose, CA 95119-2312										
			8,950.00	2.00							
1	Burke, James	12/31/2017	800.00		VC	123-60-932	17AC	1000		T1	
	826 Connections Way	02/24/2016	500.00		CK	123-45-678	16AC	1000		T2	
	Palo Alto, CA 94304-7899										
			1,300.00	2.00							
20	Burke, James	02/08/2014	600.00		CK	123-60-932	14AC	1000		T1	
	826 Connections Way	12/20/2013	890.00		CK	123-45-456	13AC	1000		T2	
	Palo Alto, CA 94304-7899										
			1,490.00	2.00							
27	Burke, James	03/31/2017	50,000.00		CK	123-60-932	17AC	1000	APPEAL1	T2	
	The Corporation For Public Broadcasting										
	1105 Information Avenue										
	San Francisco, CA 94175		50,000.00	1.00							

Report Menu Name

Header - Donation History Report, With Address, No In-kinds

Description

Designed to be used with a Header-based Selection Result, this report layout will show all donations for each constituent, with the exception of non-monetary donations and soft credit donations. The full name and address of each constituent is also shown in a mailing label-style vertical format.

01/26/2018 **Header - Donation History Report, Wth Address, No In-kinds** Page 1

Universal Qualification

ID	Name/Address	Date	Amount	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
32	Anderson, Brad	04/25/2017	100.00		CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
	Intrepid Systems Inc.	04/25/2017	100.00		CK	123-45-456	17AC	1000	APPEAL1	BASIC	General comment goes here
	701 Galer St.	03/04/2017	1,000.00		CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
	Seattle, WA 98109	11/15/2016	5,000.00		CA	123-45-456	16AC	1000	AM1	T1	
		08/31/2015	2,000.00		CA	123-45-456	15AC	1000	AM1	T1	General comment
		05/29/2014	1,000.00		CA	123-45-456	14AC	1000	AM1	T1	
		02/19/2013	1,400.00		CA	123-45-456	13AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
		08/26/2012	3,000.00		CA	123-45-456	12AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
		05/12/2011	2,000.00		AE	100-4010-7001-	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
		02/18/2011	1,500.00		AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's donation
		01/25/2011	1,500.00		CK	123-45-456	11AC	1000	APPEAL1	T1	
		03/26/2010	4,000.00		AE	123-45-456	10AC	1000		T1	
		11/17/2009	2,500.00		AE	123-45-456	09AC	1000		T1	
		12/02/2008	1,500.00		CK	123-45-456	08AC	1000	APPEAL1	T1	
		02/20/2007	900.00		CA	123-45-456	07AC	1000	APPEAL1	T1	
		12/23/2006	500.00		CK	123-45-456	06AC	1000		T1	Soft Credit to Baker
		01/24/2005	1,500.00		CK	123-45-456	05AC	1000		T1	
		01/25/2004	1,000.00		CK	123-45-456	04AC	1000		T1	
		01/25/2003	750.00		CK	123-45-456	03AC	1000		T1	
		01/24/2002	600.00		CK	123-45-456	MUSIC	1000		T1	
		02/28/2001	200.00		CK	123-45-456	01AC	1000		T1	
		01/24/2001	400.00		CK	123-45-456	MUSIC	1000		T1	
		02/28/1999	50.00		CK	123-45-456	MUSIC	1000		T1	
		01/25/1999	100.00		CK	123-45-456	MUSIC	1000		T1	
			32,600.00	24.00							
28	Bach, Johann	04/15/2017	500.00		CA	123-50-937	17AC	2000	APPEAL1	T1	
	Bach Memorial Account	02/04/2013	250.00		CA	123-45-456	13AC	1000	AM1	T1	
	3543 Brandenburg Way	01/04/2013	500.00		CA	123-45-456	13AC	1000	AM1	T1	
	Seattle, WA 98109										
			1,250.00	3.00							

Report Menu Name

Header - Donation Receipts, All Donations For Current Calendar Year

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the current calendar year. If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the current calendar year. This receipt report is convenient for printing year-to-date receipt reports on demand - that is, when a donor calls asking for a year-to-date receipt. When that happens, simply lookup the donor's record, then click the Print icon on the DonorQuest toolbar, click OK on the default report title, and choose this report from the menu. Note when running annual tax receipts, and you are already in the new year, you would normally use the report titled, "Header - Donation Receipts, Previous Year Donations Only."

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 01/26/2018

Mr. Brad Anderson, Jr. and Mrs. Samantha Keller
Intrepid Systems Inc.
2601 Elliott Ave
Suite 3109
Seattle, WA 98121

Identification No.: 32

DONATIONS IN 2018:

DATE	RECEIPT #	CAMPAIGN	FUND	TYPE	AMOUNT	TAX DEDUCTIBLE
01/15/2018	23588	2018 Annual Campaign	Unrestricted Fund	Check	$500.00	$500.00

TAX DEDUCTIBLE DOLLAR DONATIONS FOR 2018:	$500.00
TOTAL DOLLAR DONATIONS FOR 2018:	$500.00
LIFETIME TOTAL OF ALL DOLLAR DONATIONS:	$33,100.00

YOUR DONATIONS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Header - Donation Receipts, All Donations For Current Calendar Year, Letter Format

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the current calendar year. The layout of the receipt is in a letter format, the text of which may be customized by copying and editing the report layout. You may even add your organization's logo and a digital signature to the report! If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the current calendar year.

January 26, 2018

Mr. Brad Anderson, Jr. and Mrs. Samantha Keller
Intrepid Systems Inc.
701 Galer St.
Seattle, WA 98109

Dear Brad and Samantha,

I acknowledge with grateful appreciation the receipt of your monetary contributions to date in 2018 as listed below:

Donation Date	Donation Amount
01/15/2018	$500.00
	$500.00

Let me take this time to thank you for your generosity so far this year.

Sincerely,

Report Menu Name

Header - Donation Receipts, All Donations For Donor

Description

Designed to be used with a Header-based Selection Result, this report layout will show a receipt for each constituent with all donations they have ever given. This is mainly to be used on demand - that is, when a donor calls asking for a complete record of their lifetime giving. When that happens, simply lookup the donor's record, then click the Print icon on the DonorQuest toolbar, click OK on the default report title, and choose this report from the menu

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 01/27/2018

Mr. Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

DATE	RECEIPT #	CAMPAIGN	FUND	TYPE	AMOUNT	TAX DEDUCTIBLE
12/15/2017	23594	Annual Christmas Cam	Unrestricted Fund	Check	$10,000.00	$10,000.00
03/10/2017	23593	2017 Annual Campaign	Unrestricted Fund	Check	$7,000.00	$7,000.00
12/10/2016	23592	Annual Christmas Cam	Unrestricted Fund	Check	$6,500.00	$6,500.00
03/29/2016	23591	2016 Annual Campaign	Unrestricted Fund	Check	$6,000.00	$6,000.00
12/08/2015	23590	Annual Christmas Cam	Unrestricted Fund	Check	$5,000.00	$5,000.00
03/15/2015	23589	2015 Annual Campaign	Unrestricted Fund	Check	$4,500.00	$4,500.00

TOTAL DONATIONS FOR CALENDAR 2015 :	$9,500.00
TOTAL DONATIONS FOR CALENDAR 2016 :	$12,500.00
TOTAL DONATIONS FOR CALENDAR 2017 :	$17,000.00
TOTAL DONATIONS FOR CALENDAR 2018 :	$0.00
LIFETIME TOTAL OF ALL DOLLAR DONATIONS:	$39,000.00

YOUR DONATIONS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Header - Donation Receipts, Previous 90 Day's Donations Only

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the past 90 days from the date on which the report is run. If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the past 90 days.

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 01/27/2018

Mr. Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

DONATIONS SINCE 10/29/2017

DATE	RECEIPT #	CAMPAIGN	FUND	TYPE	AMOUNT	TAX DEDUCTIBLE
12/15/2017	23594	Annual Christmas Cam	Unrestricted Fund	Check	$10,000.00	$10,000.00

TOTAL DOLLAR DONATIONS SINCE 10/29/2017:	$10,000.00
TAX DEDUCTIBLE DOLLAR DONATIONS SINCE 2017:	$10,000.00
LIFETIME TOTAL OF ALL DONATIONS:	$39,000.00

YOUR DONATIONS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Header - Donation Receipts, Previous 90 Day's Donations Only, Letter Format

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the past 90 days from the date on which the report is run. The layout of the receipt is in a letter format, the text of which may be customized by copying and editing the report layout. You may even add your organization's logo and a digital signature to the report! If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the past 90 days.

January 28, 2018

Mr. Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Dear Elon,

I acknowledge with grateful appreciation the receipt of your monetary contributions over the past 90 days as listed below:

Donation Date	Donation Amount
12/15/2017	$10,000.00
	$10,000.00

Sincerely,

Report Menu Name

Header - Donation Receipts, Previous Month Donations Only

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the previous calendar month from the date on which the report is run. If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the previous calendar month. Note that unlike the 90-day receipt report, this is not simply 30 days in the past. It will have all the donations from the previous full calendar month. This means that is suitable for use with high volume donors as it could be sent on a monthly basis instead of sending multiple thank-you letters for each individual gift for the same donor. This will also save a lot on postage (if you send acknowledgements through regular mail) and will also increase donor's confidence that your organization knows how to spend money wisely. Nothing shows wasted donation dollars like sending a donor multiple acknowledgements separately in a short space of time.

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 01/28/2018

Mr. Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

DONATIONS FOR DECEMBER, 2017

DATE	RECEIPT #	CAMPAIGN	FUND	TYPE	AMOUNT	TAX DEDUCTIBLE
12/15/2017	23594	Annual Christmas Cam	Unrestricted Fund	Check	10,000.00	10,000.00

TAX DEDUCTIBLE DOLLAR DONATIONS FOR DECEMBER	$10,000.00
TOTAL DOLLAR DONATIONS FOR DECEMBER, 2017:	$10,000.00
LIFETIME TOTAL OF DONATIONS:	$39,000.00

YOUR DONATIONS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Header - Donation Receipts, Previous Month Donations Only, Letter Format

Description

The Letter Format version of the, "Header - Donation Receipts, Previous Month Donations Only" report, described above.

January 28, 2018

Mr. Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Dear Elon,

I acknowledge with grateful appreciation the receipt of your monetary contributions for DECEMBER, 2017 as listed below:

Donation Date	Donation Amount
12/15/2017	$10,000.00
	$10,000.00

Sincerely,

Report Menu Name

Header - Donation Receipts, Previous Year Donations Only

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the previous calendar year from the date on which the report is run. If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the previous calendar year. This (or the letter version shown below) is the receipt to use for your normal annual tax receipts for all donors.

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 01/28/2018

Mr. Brad Anderson, Jr. and Mrs. Samantha Keller
Intrepid Systems Inc.
2601 Elliott Ave
Suite 3109
Seattle, WA 98121

Identification No.: 32

DONATIONS IN CALENDAR YEAR 2017

DATE	RECEIPT #	CAMPAIGN	FUND	TYPE	AMOUNT	TAX DEDUCTIBLE
04/25/2017	23587	2017 Annual Campaign	Unrestricted Fund	Check	100.00	100.00
04/25/2017	23586	2017 Annual Campaign	Unrestricted Fund	Check	100.00	100.00
03/04/2017	23550	2017 Annual Campaign	Unrestricted Fund	Cash Donation	1,000.00	1,000.00

TAX DEDUCTIBLE DOLLAR DONATIONS FOR 2017:	$1,200.00
TOTAL DOLLAR DONATIONS FOR 2017:	$1,200.00
LIFETIME TOTAL OF DOLLAR DONATIONS:	$33,100.00

YOUR DONATIONS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Header - Donation Receipts, Previous Year Donations Only, Letter Format

Description

Designed to be run directly from the DonorQuest report menu, or used with a Header-based Selection Result, this report layout will generate a tax receipt for each constituent, showing all donations for the previous calendar year from the date on which the report is run. If you run the report directly (outside of a selection) it will run its own selection for all the donors who have any donations in the previous calendar year. This (or the regular version shown above) is the receipt to use for your normal annual tax receipts for all donors. The layout of the receipt is in a letter format, the text of which may be customized by copying and editing the report layout. You may even add your organization's logo and a digital signature to the report!

January 28, 2018

Mr. Brad Anderson, Jr. and Mrs. Samantha Keller
Intrepid Systems Inc.
701 Galer St.
Seattle, WA 98109

Dear Brad and Samantha,

I acknowledge with grateful appreciation the receipt of your contributions in 2017 as listed below:

Donation Date	Donation Amount
04/25/2017	$100.00
04/25/2017	$100.00
03/04/2017	$1,000.00
	$1,200.00

TAX DEDUCTIBLE DOLLAR DONATIONS FOR 2 $1,200.00

Let me take this time to thank you for your generosity in 2017 and to wish you good fortune in 2018.

Sincerely,

Report Menu Name

Header - Donor Name And Address And Total Hours (HR) Giving, Counts, Average

Description

Designed to be used with a Header-based Selection Result, this report layout will show a sum, count, and average number of volunteer hour donations. The report filters donations by Donation Type, processing only those donations which have a code of HR (for hours) in the Donation Type field.

01/28/2018 **Header - Donor Name And Address And Total Hours (HR) Giving, Counts, Average** Page 1

Volunteers

ID	Name/Address	HR Amount	HR Count	HR Average
15	Baker, Thomas 4968 Tardis Ave. San Jose, CA 95112-3211	20.00	1	20.00
21	Knight, Paula 1410 Holly Ave. San Jose, CA 95133-4333	8.00	1	8.00
26	Smith, John 4321 Another Smith Way San Mateo, CA 94403	8.00	1	8.00
		36.00	3	12.00

Report Menu Name

Header - Donor Name And Street Address

Description

Designed to be used with a Header-based Selection Result, this report layout is a very simple one-line per constituent listing of primary name and address. It is often used as a starting point for creating custom report layouts since it acts as a basic core upon which more complex ideas can be introduced.

01/28/2018 **Header - Donor Name And Street Address** Page 1

All Constituents

Last Name	First Name	Address	Address2	City	State	Zip
Anderson	Brad	701 Galer St.		Seattle	WA	98109
Bach	Johann	3543 Brandenburg Way		Seattle	WA	98109
Baker	Thomas	4968 Tardis Ave.		San Jose	CA	95112-3211
Bowie	Denise	123 First Avenue	Apt 200	San Jose	CA	95119-2312
Burke	James	826 Connections Way		Palo Alto	CA	94304-7899
Burke	James	826 Connections Way		Palo Alto	CA	94304-7899
Burke	James	1105 Information Avenue		San Francisco	CA	94175
Davidson	Peter	3775 Galafrey Way		Palo Alto	CA	94300-2112
Foster	James	14552 Medical Dr.		Saratoga	CA	95070-3212
Gore	Martin L.	Stanford OPA Bldg.		Eugene	OR	97401
Harrison	George	234 Abbey Road		San Francisco	CA	94161-2323
Harrison	Timothy	486 Intel Way.		San Jose	CA	95131-1234
Hayward	Justin	1701 Enterprise Way		Seattle	WA	98109
Jarre	Jean-Michel	644 Santa Rita		Seattle	WA	98109-1234
Kirk	James	1701 Enterprise Way		Mount Shasta	CA	96067-1234
Knight	Paula	1410 Holly Ave.		San Jose	CA	95133-4333
Koneig	John	12344 First Way		San Jose	CA	95135-2432
Lennon	John	234 Abbey Road		San Francisco	CA	94161-2323
Lodge	John	71828 One Way		Yuba City	CA	95991-3171
McGoohan	Patrick	1984 In The Village		Oceania	CA	95070-3212
Mozart	Wolfgang	62734 Vienna Ave		Salzburg	CA	92104
Musk	Elon	3141 Tesla Ave.		Fremont	CA	94538
Schmidt	Christopher	368 Moore Ave.		Saratoga	CA	95070-1234
Scott	Montgomery	685 Cherrystone Drive		Schenectady	NY	12345
Smith	John	4321 Another Smith Way		San Mateo	CA	94403
Waters	Roger	1234 Beyond The Wall Way		San Mateo	CA	94403

Report Menu Name

Header - Donor Name And Street Address For Duplicate Record Check

Description

Designed to be used with a Header-based duplicate record check Selection Result, this report layout will group constituents by the first four characters of their street address, so that true duplicate constituent records can be easily spotted.

01/28/2018 Header - Donor Name And Street Address For Duplicate Record Check Page 1
ABC Nonprofit Organization
Possible Duplicate Constituents

ID Num	Last Name	First Name	Organization Name	Address	Address2	City	State	Zip
Possible Duplicate Address Starting With: 826								
1	Burke	James		826 Connections Way		Palo Alto	CA	94304-7899
20	Burke	James		826 Connections Way		Palo Alto	CA	94304-7899

Report Menu Name

Header - Donor Name And Street Address Simplified

Description

Designed to be used with a Header-based Selection Result, this report layout is a variation on the basic, "Header - Donor Name And Street Address."

01/28/2018 | Header - Donor Name And Street Address | Page 1

All Constituents

Last Name	First Name	Address
Anderson	Brad	701 Galer St.
Bach	Johann	3543 Brandenburg Way
Baker	Thomas	4968 Tardis Ave.
Bowie	Denise	123 First Avenue
Burke	James	826 Connections Way
Burke	James	826 Connections Way
Burke	James	1105 Information Avenue
Davidson	Peter	3775 Galafrey Way
Foster	James	14552 Medical Dr.
Gore	Martin L.	Stanford OPA Bldg.
Harrison	George	234 Abbey Road
Harrison	Timothy	486 Intel Way.
Hayward	Justin	1701 Enterprise Way
Jarre	Jean-Michel	644 Santa Rita
Kirk	James	1701 Enterprise Way
Knight	Paula	1410 Holly Ave.
Koneig	John	12344 First Way
Lennon	John	234 Abbey Road
Lodge	John	71828 One Way
McGoohan	Patrick	1984 In The Village
Mozart	Wolfgang	62734 Vienna Ave
Musk	Elon	3141 Tesla Ave.
Schmidt	Christopher	368 Moore Ave.
Scott	Montgomery	685 Cherrystone Drive
Smith	John	4321 Another Smith Way
Waters	Roger	1234 Beyond The Wall Way

Report Menu Name

Header - Donor Name And Street Address With List Codes

Description

Designed to be used with a Header-based Selection Result, this report layout will show the basic name and address information for each constituent in separate columns, but then it will vertically stack the up to ten list codes each constituent account may have, so that everything will comfortably fit within the margins of a printed page.

01/28/2018 **Header - Donor Name And Street Address With List Codes** Page 1
All Constituents

Last Name	First Name	Address	City	State	Zip	LISTS
Anderson	Brad	701 Galer St.	Seattle	WA	98109	Board Member List Volunteer List Appropriations Committee Steering Committee
Bach	Johann	3543 Brandenburg Way	Seattle	WA	98109	Primary List
Baker	Thomas	4968 Tardis Ave.	San Jose	CA	95112-3211	Employee List Volunteer List Soft Credit Recipient
Bowie	Denise	123 First Avenue Apt 200	San Jose	CA	95119-2312	Business List
Burke	James	826 Connections Way	Palo Alto	CA	94304-7899	Business List Volunteer List
Burke	James	826 Connections Way	Palo Alto	CA	94304-7899	Business List
Burke	James	1105 Information Avenue	San Francisco	CA	94175	Business List
Davidson	Peter	3775 Galafrey Way	Palo Alto	CA	94300-2112	Volunteer List
Foster	James	14552 Medical Dr.	Saratoga	CA	95070-3212	Appropriations Committee Finance Committee
Gore	Martin L.	Stanford OPA Bldg.	Eugene	OR	97401	Volunteer List
Harrison	George	234 Abbey Road	San Francisco	CA	94161-2323	Business List
Harrison	Timothy	486 Intel Way.	San Jose	CA	95131-1234	Board Member List Volunteer List
Hayward	Justin	1701 Enterprise Way	Seattle	WA	98109	Media List Radio List Volunteer List Board Member List
Jarre	Jean-Michel	644 Santa Rita	Seattle	WA	98109-1234	Business List

Report Menu Name

Header - Donor Name And Street Address With Most Recent Donation Stimulus

Description

Designed to be used with a Header-based Selection Result, this report layout is a variation on the basic street address report which includes the date and Stimulus code of the most recent donation (if any) for each constituent.

01/28/2018 Header - Donor Name And Street Address With Most Recent Donation Stimulus Page 1
All Constituents

Last Name	First Name	Address	City	State	Zip	Date	Stimulus
Anderson	Brad	701 Galer St.	Seattle	WA	98109	01/15/2018	18AC
Bach	Johann	3543 Brandenburg Way	Seattle	WA	98109	04/15/2017	17AC
Baker	Thomas	4968 Tardis Ave.	San Jose	CA	95112-3211	03/31/2017	17AC
Bowie	Denise	123 First Avenue	San Jose	CA	95119-2312	03/31/2017	17AC
Burke	James	826 Connections Way	Palo Alto	CA	94304-7899	12/31/2017	17AC
Burke	James	826 Connections Way	Palo Alto	CA	94304-7899	02/08/2014	14AC
Burke	James	1105 Information Avenue	San Francisco	CA	94175	03/31/2017	17AC
Davidson	Peter	3775 Galafrey Way	Palo Alto	CA	94300-2112	01/07/2018	
Foster	James	14552 Medical Dr.	Saratoga	CA	95070-3212	01/30/2017	17AC
Gore	Martin L.	Stanford OPA Bldg.	Eugene	OR	97401	01/06/2014	14AC
Harrison	George	234 Abbey Road	San Francisco	CA	94161-2323	11/20/2016	16AC
Harrison	Timothy	486 Intel Way.	San Jose	CA	95131-1234	04/04/2013	13AC
Hayward	Justin	1701 Enterprise Way	Seattle	WA	98109	03/26/2017	17AC
Jarre	Jean-Michel	644 Santa Rita	Seattle	WA	98109-1234	02/23/2014	BRKFST
Kirk	James	1701 Enterprise Way	Mount Shasta	CA	96067-1234	01/31/2014	14AC
Knight	Paula	1410 Holly Ave.	San Jose	CA	95133-4333	01/23/2015	UNSOL
Koneig	John	12344 First Way	San Jose	CA	95135-2432		
Lennon	John	234 Abbey Road	San Francisco	CA	94161-2323	09/25/2014	14AC
Lodge	John	71828 One Way	Yuba City	CA	95991-3171	04/05/2015	UNSOL
McGoohan	Patrick	1984 In The Village	Oceania	CA	95070-3212	02/08/2014	14AC
Mozart	Wolfgang	62734 Vienna Ave	Salzburg	CA	92104	09/28/2007	UNSOL
Musk	Elon	3141 Tesla Ave.	Fremont	CA	94538	12/15/2017	ACC
Schmidt	Christopher	368 Moore Ave.	Saratoga	CA	95070-1234	01/05/2017	UNSOL
Scott	Montgomery	685 Cherrystone Drive	Schenectady	NY	12345	12/28/2010	10AC
Smith	John	4321 Another Smith Way	San Mateo	CA	94403		
Waters	Roger	1234 Beyond The Wall Way	San Mateo	CA	94403	03/31/2017	17AC

Report Menu Name

Header - Donor Name, Address, Phone, EMail, Last Gift Info, List Codes

Description

Designed to be used with a Header-based Selection Result, for each constituent this report layout will show the name and address information in a mailing label format, primary phone numbers, email and web address, list codes, date and amount of most recent donation (if any).

01/28/2018 **Header - Donor Name, Address, Phone, EMail, Last Gift Info, List Codes** Page 1

All Constituents

Giving Entity	Phone Numbers	Internet Info	Lists	Last Gift	Last Gift
Brad Anderson Intrepid Systems Inc. 701 Galer St. Seattle, WA 98109	H: (800) 555-1212 W: (800) 952-8228 M: F: (800) 533-9218	Brad@donorquest.com www.donorquest.com	Board Member List Volunteer List Appropriations Committee Steering Committee	01/15/2018	500.00
Johann Bach Bach Memorial Account 3543 Brandenburg Way Seattle, WA 98109	H: (206) 270-1050 W: M: F:	Johann@donorquest.co www.donorquest.com	Primary List	04/15/2017	500.00
Thomas Baker 4968 Tardis Ave. San Jose, CA 95112-3211	H: (510) 356-7540 W: (123) 456-7890 X123 M: F:	Thomas@donorquest.co www.donorquest.com	Employee List Volunteer List Soft Credit Recipient	03/31/2017	750.00
Denise Bowie 123 First Avenue Apt 200 San Jose, CA 95119-2312	H: (408) 555-1212 W: M: F:	Denise@donorquest.co www.donorquest.com	Business List	03/31/2017	8,450.00
James Burke 826 Connections Way Palo Alto, CA 94304-7899	H: (510) 328-2028 W: M: F:	James@donorquest.co www.donorquest.com	Business List Volunteer List	12/31/2017	800.00
James Burke 826 Connections Way Palo Alto, CA 94304-7899	H: (415) 555-1212 W: M: F:	James@donorquest.co www.donorquest.com	Business List	02/08/2014	600.00
James Burke The Corporation For Public Broadcas 1105 Information Avenue San Francisco, CA 94175	H: ( ) - W: (415) 555-1234 M: F:	James@donorquest.co www.donorquest.com	Business List	03/31/2017	50,000.00
Peter Davidson Decca Records 3775 Galafrey Way Palo Alto, CA 94300-2112	H: (415) 555-1212 W: M: F:	Peter@donorquest.com www.donorquest.com	Volunteer List	01/07/2018	50.00

Report Menu Name

Header - Donor Report (Ranked) w/ Contact Info & Donation Total For A Specific Stimulus

Description

Designed to be used with a Header-based Selection Result, this report layout serves as a template which you may copy and customize to show only donations for a specific stimulus code. In this example, we have customized the report to show only donations with the 17AC stimulus code. What makes this report special, and different than what you could accomplish simply running and printing a donation-based selection for a specific stimulus, is that this report is able to rank the constituents by total giving to the chosen stimulus. Calendar year totals for all donations for each constituent are also shown for the current and previous three calendar years.

01/28/2018 Header - Donor Report (Ranked) w/ Contact Info & Donation Total For A Specific Stimulus Page 1
All Constituents
17AC

Rank	ID And Donor Type	Giving Entity/Address	Primary / Secondary Contact	Specific Stimulus Total	Year	CY Totals
1	27 Corporation	Prof. James Burke The Corporation For Public Broadcasting 1105 Information Avenue San Francisco CA 94175	PH: ( ) - PW: (415) 555-1234 PM: PF: SH: SW: SM: SF:	50000.00	2018: 2017: 2016: 2015:	$0.00 $50,000.00 $0.00 $0.00
2	12 Individual	Justin Hayward Mrs. Christine Hayward Lawyer Threshold Records 1701 Enterprise Way Seattle WA 98109	PH: (425) 555-1212 PW: (206) 555-1212 1234 PM: PF: SH: (415) 555-1212 SW: (415) 222-2222 SM: SF:	9700.00	2018: 2017: 2016: 2015:	$0.00 $9,700.00 $8,000.00 $7,500.00
3	18 Individual	Mrs. Denise Bowie 123 First Avenue Apt 200 San Jose CA 95119-2312	PH: (408) 555-1212 PW: PM: PF: SH: SW: SM: SF:	8450.00	2018: 2017: 2016: 2015:	$0.00 $8,450.00 $0.00 $5,500.00

Report Menu Name

Header - Envelopes (Using First + Last Name)

Description

Designed to be used with a Header-based Selection Result, this report layout is designed to print constituent names and addresses directly on envelopes. There are also two additional variations on this report you will find on the DonorQuest report menu named, "Header - Envelopes (Using Salutation1 & Extra Address Swapping by Time)", and "Header - Envelopes (Using Salutation1)." The former honors the extra address swapping logic which allows an extra address to be swapped in for a constituent's main address if an extra address is found with qualifying start and end dates. The later will use the Salutation 1 field as the first line of the address block instead of simply the primary first and last names.

Brad Anderson
Intrepid Systems Inc.
701 Galer St.
Seattle, WA 98109

Report Menu Name

Header - Extra Address Report

Description

Designed to be used with a Header-based Selection Result, this report layout will show all extra addresses associated with each constituent.

01/28/2018 **Header - Extra Address Report** Page 1
All Constituents

ID	Giving Entity	Primary Address	Extra Names/Salutation	Extra Addresses
32	Intrepid Systems Inc.	701 Galer St. Seattle, WA 98109 USA Addr Type: Home Bad Addr? N		2601 Elliott Ave Suite 3109 Seattle, WA 98121 Summer Home Start: 01/01/2002 End: 06/30/2002 -
1	Burke, James	826 Connections Way Palo Alto, CA 94304-7899 Addr Type: Bad Addr? N	James Burke	1234 Prometheus Way. San Mateo, CA 35435-4354 Start: End: -
24	IBM Corporation	486 Intel Way. San Jose, CA 95131-1234 Addr Type: Bad Addr? N		586 Horizon Ave. San Jose, CA 12345-6789 Mailing Address Start: End: -
				31415 Computation Dr. San Jose, CA 54875-6431 Physical Address Start: End: -
12	Hayward, Justin	1701 Enterprise Way Seattle, WA 98109 USA Addr Type: Work Bad Addr? N	Justin Hayward Justin Hayward	54321 Blue Sea Way San Diego, CA 92105 Fall Seasonal Address Start: 09/01/2017 End: 12/01/2017 -
			Justin Hayward Justin Hayward	1234 Sunny Way Los Angeles, CA 90001-6789 Summer Home Start: 06/01/2003 End: 09/01/2003 -
			Justin Hayward Justin Hayward	123 Summit Way Apt. 200 Seattle, WA 98100 Winter Home Start: 12/01/2003 End: 01/15/2004

Report Menu Name

Header - First/Latest/Largest

Description

Designed to be used with a Header-based Selection Result, this report layout will show the ID, name, lifetime count of gifts, year with most giving, date and amount of first gift, date and amount of most recent gift, and average gift amount for each constituent.

01/28/2018 **Header - First/Latest/Largest** **Page 1**

All Constituents

ID	Giving Entity	# Gifts	Best Year	First Gift	Amount	Last Gift	Amount	Greatest Gift	Ave Gift Amt
6	1984 Productions	5	2014	04/20/2011	700.00	02/08/2014	400.00	700.00	400.00
28	Bach Memorial Account	3	2013	01/04/2013	500.00	04/15/2017	500.00	500.00	416.67
15	Baker, Thomas	29	2009	01/25/2007	5,000.00	03/31/2017	750.00	5,000.00	769.64
18	Bowie, Denise	5	2017	03/23/2013	2,500.00	03/31/2017	8,450.00	8,450.00	4,190.00
1	Burke, James	15	2013	02/13/2012	4,000.00	12/31/2017	800.00	4,000.00	1,006.67
20	Burke, James	14	2013	04/11/2012	400.00	02/08/2014	600.00	4,520.00	636.71
11	Decca Records	6	2012	09/06/2012	150.00	01/07/2018	50.00	200.00	141.67
17	Foster, James	6	2013	04/20/2011	500.00	01/30/2017	450.00	500.00	270.83
4	Gore, Martin L.	6	2013	10/11/2012	175.00	01/06/2014	560.00	1,025.00	360.00
12	Hayward, Justin	38	2003	01/25/1997	100.00	03/26/2017	9,700.00	10,000.00	2,473.95
24	IBM Corporation	3	2013	03/18/2012	1,234.56	04/04/2013	12,345.67	12,345.67	4,938.08
32	Intrepid Systems Inc.	25	2016	01/25/1999	100.00	01/15/2018	500.00	5,000.00	1,324.00
21	Knight, Paula	13	2015	01/22/2006	50.00	01/23/2015	5,000.00	5,000.00	983.33
13	Lennon, John	2	2013	11/14/2013	12,000.00	09/25/2014	5,000.00	12,000.00	8,500.00
23	Lodge, John	4	2014	12/30/2012	300.00	04/05/2015	700.00	7,500.00	3,375.00
5	Mozart Memorial Account	1	2007	09/28/2007	500.00	09/28/2007	500.00	500.00	500.00
53	Musk, Elon	6	2017	03/15/2015	4,500.00	12/15/2017	10,000.00	10,000.00	6,500.00
29	Northern Songs Limited, (U.S.	12	2016	04/01/2006	10,000.00	11/20/2016	14,000.00	70,000.00	28,625.00
2	Progressive Music, Inc.	6	2012	05/03/2012	222.00	02/23/2014	725.00	835.00	482.67
7	Schmidt Aeronautic Foundatio	5	2013	03/28/2011	500.00	01/05/2017	600.00	4,000.00	1,340.00
8	Scott, Montgomery	1	2010	12/28/2010	1,000.00	12/28/2010	1,000.00	1,000.00	1,000.00
26	Smith, John	2	2010	12/03/2010	200.00	12/03/2010	200.00	200.00	200.00
27	The Corporation For Public Br	1	2017	03/31/2017	50,000.00	03/31/2017	50,000.00	50,000.00	50,000.00
3	Trek Foundation	5	2012	05/12/2011	400.00	01/31/2014	350.00	7,450.00	2,240.00
10	Waters, Roger	6	2014	01/05/2012	750.00	03/31/2017	4,000.00	10,000.00	3,375.00
		219			95,781.56		127,180.67	230,725.67	

Report Menu Name

Header - Fiscal Year Totals And Donation Counts For Previous Two Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent name, ID number, total giving for the previous two fiscal years, and a count of how many donations the constituent made in each of the years. There is also a calendar year version of this report named, "Header - Calendar Year Totals And Donation Counts For Previous Two Years."

01/28/2018 **Header - Fiscal Year Totals And Donation Counts For Previous Two Years** Page 1

All Constituents

ID Num	Giving Entity	2017	Count	2016	Count
6	1984 Productions	0.00	0	0.00	0
28	Bach Memorial Account	500.00	1	0.00	0
15	Baker, Thomas	750.00	1	3,100.00	7
18	Bowie, Denise	8,450.00	1	0.00	0
1	Burke, James	0.00	0	500.00	1
20	Burke, James	0.00	0	0.00	0
11	Decca Records	0.00	0	0.00	0
17	Foster, James	450.00	1	0.00	0
4	Gore, Martin L.	0.00	0	0.00	0
12	Hayward, Justin	17,700.00	2	7,500.00	1
24	IBM Corporation	0.00	0	0.00	0
32	Intrepid Systems Inc.	6,200.00	4	2,000.00	1
21	Knight, Paula	0.00	0	0.00	0
19	Koneig, John	0.00	0	0.00	0
13	Lennon, John	0.00	0	0.00	0
23	Lodge, John	0.00	0	0.00	0
5	Mozart Memorial Account	0.00	0	0.00	0
53	Musk, Elon	13,500.00	2	11,000.00	2
29	Northern Songs Limited, (U.S. Division)	108,000.00	4	70,000.00	1
2	Progressive Music, Inc.	0.00	0	0.00	0
7	Schmidt Aeronautic Foundation	600.00	1	0.00	0
8	Scott, Montgomery	0.00	0	0.00	0
26	Smith, John	0.00	0	0.00	0
27	The Corporation For Public Broadcasting	50,000.00	1	0.00	0
3	Trek Foundation	0.00	0	0.00	0
10	Waters, Roger	4,000.00	1	0.00	0
		210,150.00	19	94,100.00	13

Report Menu Name

Header - Fiscal Year Totals And Donor Counts For Previous Two Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show the constituent name, ID number, total giving for the previous two fiscal years, and a simple counter column for each year. These counter columns will simply register a 1 if the donor gave in the corresponding year, or a zero if not. Since these counters are summed on the last page of the report, you will be able to see if the count of donors for each of the years increased or decreased, and by how much. There is also a fiscal year version of this report named, "Header - Calendar Year Totals And Donor Counts For Previous Two Years."

01/28/2018 **Header - Fiscal Year Totals And Donor Counts For Previous Two Years** **Page 1**

All Constituents

ID Num	Giving Entity	2017	Donor Count	2016	Donor Count
6	1984 Productions	0.00	0	0.00	0
28	Bach Memorial Account	500.00	1	0.00	0
15	Baker, Thomas	750.00	1	3,100.00	1
18	Bowie, Denise	8,450.00	1	0.00	0
1	Burke, James	0.00	0	500.00	1
20	Burke, James	0.00	0	0.00	0
11	Decca Records	0.00	0	0.00	0
17	Foster, James	450.00	1	0.00	0
4	Gore, Martin L.	0.00	0	0.00	0
12	Hayward, Justin	17,700.00	1	7,500.00	1
24	IBM Corporation	0.00	0	0.00	0
32	Intrepid Systems Inc.	6,200.00	1	2,000.00	1
21	Knight, Paula	0.00	0	0.00	0
19	Koneig, John	0.00	0	0.00	0
13	Lennon, John	0.00	0	0.00	0
23	Lodge, John	0.00	0	0.00	0
5	Mozart Memorial Account	0.00	0	0.00	0
53	Musk, Elon	13,500.00	1	11,000.00	1
29	Northern Songs Limited, (U.S. Division)	108,000.00	1	70,000.00	1
2	Progressive Music, Inc.	0.00	0	0.00	0
7	Schmidt Aeronautic Foundation	600.00	1	0.00	0
8	Scott, Montgomery	0.00	0	0.00	0
26	Smith, John	0.00	0	0.00	0
27	The Corporation For Public Broadcasting	50,000.00	1	0.00	0
3	Trek Foundation	0.00	0	0.00	0
10	Waters, Roger	4,000.00	1	0.00	0
		210,150.00	11	94,100.00	6

Report Menu Name

Header - Giving Increase (Decrease) For Current/Previous Calendar Year

Description

Designed to be used with a Header-based Selection Result, this report layout will show an alphabetical listing by constituent name of the increase in giving between the current and previous calendar year for each constituent. The percent of increase or decrease is also shown. A decrease in giving between the two years will be shown as a negative number.

01/28/2017 | Header - Giving Increase (Decrease) For Current/Previous Calendar Year | Page 1

All Constituents

ID	Giving Entity	2017	2016	Increase/Decrease	% Increase/Decrease
32	Intrepid Systems Inc.	1,200.00	5,000.00	-3,800.00	-76.0%
28	Bach Memorial Account	500.00	0.00	500.00	100.0%
15	Baker, Thomas	750.00	2,600.00	-1,850.00	-71.2%
18	Bowie, Denise	8,450.00	0.00	8,450.00	100.0%
1	Burke, James	800.00	500.00	300.00	60.0%
20	Burke, James	0.00	0.00	0.00	0.0%
27	The Corporation For Public Broadcasting	50,000.00	0.00	50,000.00	100.0%
11	Decca Records	0.00	0.00	0.00	0.0%
17	Foster, James	450.00	0.00	450.00	100.0%
4	Gore, Martin L.	0.00	0.00	0.00	0.0%
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	-108,000.00	-100.0%
24	IBM Corporation	0.00	0.00	0.00	0.0%
12	Hayward, Justin	9,700.00	8,000.00	1,700.00	21.3%
2	Progressive Music, Inc.	0.00	0.00	0.00	0.0%
3	Trek Foundation	0.00	0.00	0.00	0.0%
21	Knight, Paula	0.00	0.00	0.00	0.0%
19	Koneig, John	0.00	0.00	0.00	0.0%
13	Lennon, John	0.00	0.00	0.00	0.0%
23	Lodge, John	0.00	0.00	0.00	0.0%
6	1984 Productions	0.00	0.00	0.00	0.0%
5	Mozart Memorial Account	0.00	0.00	0.00	0.0%
53	Musk, Elon	17,000.00	12,500.00	4,500.00	36.0%
7	Schmidt Aeronautic Foundation	600.00	0.00	600.00	100.0%
8	Scott, Montgomery	0.00	0.00	0.00	0.0%
26	Smith, John	0.00	0.00	0.00	0.0%
10	Waters, Roger	4,000.00	0.00	4,000.00	100.0%
		93,450.00	136,600.00	-43,150.00	-31.6%

Report Menu Name

Header - Giving Increase (Decrease) For Current/Previous Calendar Year, Ordered by Increase/Decrease

Description

This report layout has the same columns as the, "Header - Giving Increase (Decrease) For Current/Previous Calendar Year" report (shown above), but the constituents are shown in descending order by the increase or decrease between the two years. Decreases are shown first, followed by increases.

01/28/2017 **Header - Giving Increase (Decrease) For Current/Previous Calendar Year** **Page 1**

Ordered by Increase/Decrease

All Constituents

ID	Giving Entity	2017	2016	Increase/Decrease	% Increase/Decrease
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	-108,000.00	-100.0%
32	Intrepid Systems Inc.	1,200.00	5,000.00	-3,800.00	-76.0%
15	Baker, Thomas	750.00	2,600.00	-1,850.00	-71.2%
27	The Corporation For Public Broadcasting	50,000.00	0.00	50,000.00	100.0%
18	Bowie, Denise	8,450.00	0.00	8,450.00	100.0%
53	Musk, Elon	17,000.00	12,500.00	4,500.00	36.0%
10	Waters, Roger	4,000.00	0.00	4,000.00	100.0%
12	Hayward, Justin	9,700.00	8,000.00	1,700.00	21.3%
7	Schmidt Aeronautic Foundation	600.00	0.00	600.00	100.0%
28	Bach Memorial Account	500.00	0.00	500.00	100.0%
17	Foster, James	450.00	0.00	450.00	100.0%
1	Burke, James	800.00	500.00	300.00	60.0%
2	Progressive Music, Inc.	0.00	0.00	0.00	0.0%
3	Trek Foundation	0.00	0.00	0.00	0.0%
4	Gore, Martin L.	0.00	0.00	0.00	0.0%
5	Mozart Memorial Account	0.00	0.00	0.00	0.0%
6	1984 Productions	0.00	0.00	0.00	0.0%
8	Scott, Montgomery	0.00	0.00	0.00	0.0%
11	Decca Records	0.00	0.00	0.00	0.0%
13	Lennon, John	0.00	0.00	0.00	0.0%
19	Koneig, John	0.00	0.00	0.00	0.0%
20	Burke, James	0.00	0.00	0.00	0.0%
21	Knight, Paula	0.00	0.00	0.00	0.0%
23	Lodge, John	0.00	0.00	0.00	0.0%
24	IBM Corporation	0.00	0.00	0.00	0.0%
26	Smith, John	0.00	0.00	0.00	0.0%
		93,450.00	136,600.00	-43,150.00	-31.6%

Report Menu Name

Header - Giving Increase (Decrease) For Current/Previous Fiscal Year

Description

This is simply the fiscal year version of the, "Header - Giving Increase (Decrease) For Current/Previous Calendar Year" report layout, described above.

01/28/2018 **Header - Giving Increase (Decrease) For Current/Previous Fiscal Year** Page 1

All Constituents

ID	Giving Entity	2018	2017	Increase/Decrease	% Increase/Decrease
32	Intrepid Systems Inc.	500.00	6,200.00	-5,700.00	-91.9%
28	Bach Memorial Account	0.00	500.00	-500.00	-100.0%
15	Baker, Thomas	0.00	750.00	-750.00	-100.0%
18	Bowie, Denise	0.00	8,450.00	-8,450.00	-100.0%
1	Burke, James	800.00	0.00	800.00	100.0%
20	Burke, James	0.00	0.00	0.00	0.0%
27	The Corporation For Public Broadcasting	0.00	50,000.00	-50,000.00	-100.0%
11	Decca Records	50.00	0.00	50.00	100.0%
17	Foster, James	0.00	450.00	-450.00	-100.0%
4	Gore, Martin L.	0.00	0.00	0.00	0.0%
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	-108,000.00	-100.0%
24	IBM Corporation	0.00	0.00	0.00	0.0%
12	Hayward, Justin	0.00	17,700.00	-17,700.00	-100.0%
2	Progressive Music, Inc.	0.00	0.00	0.00	0.0%
3	Trek Foundation	0.00	0.00	0.00	0.0%
21	Knight, Paula	0.00	0.00	0.00	0.0%
19	Koneig, John	0.00	0.00	0.00	0.0%
13	Lennon, John	0.00	0.00	0.00	0.0%
23	Lodge, John	0.00	0.00	0.00	0.0%
6	1984 Productions	0.00	0.00	0.00	0.0%
5	Mozart Memorial Account	0.00	0.00	0.00	0.0%
53	Musk, Elon	10,000.00	13,500.00	-3,500.00	-25.9%
7	Schmidt Aeronautic Foundation	0.00	600.00	-600.00	-100.0%
8	Scott, Montgomery	0.00	0.00	0.00	0.0%
26	Smith, John	0.00	0.00	0.00	0.0%
10	Waters, Roger	0.00	4,000.00	-4,000.00	-100.0%
		11,350.00	210,150.00	-198,800.00	-94.6%

Report Menu Name

Header - Giving Increase (Decrease) For Current/Previous Fiscal Year, Ordered by Increase/Decrease

Description

This is simply the fiscal year version of the, "Header - Giving Increase (Decrease) For Current/Previous Calendar Year, Ordered by Increase/Decrease" report layout, described above.

01/28/2018 **Header - Giving Increase (Decrease) For Current/Previous Fiscal Year** Page 1

Ordered by Increase/Decrease

All Constituents

ID	Giving Entity	2018	2017	Increase/Decrease	% Increase/Decrease
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	-108,000.00	-100.0%
27	The Corporation For Public Broadcasting	0.00	50,000.00	-50,000.00	-100.0%
12	Hayward, Justin	0.00	17,700.00	-17,700.00	-100.0%
18	Bowie, Denise	0.00	8,450.00	-8,450.00	-100.0%
32	Intrepid Systems Inc.	500.00	6,200.00	-5,700.00	-91.9%
10	Waters, Roger	0.00	4,000.00	-4,000.00	-100.0%
53	Musk, Elon	10,000.00	13,500.00	-3,500.00	-25.9%
15	Baker, Thomas	0.00	750.00	-750.00	-100.0%
7	Schmidt Aeronautic Foundation	0.00	600.00	-600.00	-100.0%
28	Bach Memorial Account	0.00	500.00	-500.00	-100.0%
17	Foster, James	0.00	450.00	-450.00	-100.0%
1	Burke, James	800.00	0.00	800.00	100.0%
11	Decca Records	50.00	0.00	50.00	100.0%
2	Progressive Music, Inc.	0.00	0.00	0.00	0.0%
3	Trek Foundation	0.00	0.00	0.00	0.0%
4	Gore, Martin L.	0.00	0.00	0.00	0.0%
5	Mozart Memorial Account	0.00	0.00	0.00	0.0%
6	1984 Productions	0.00	0.00	0.00	0.0%
8	Scott, Montgomery	0.00	0.00	0.00	0.0%
13	Lennon, John	0.00	0.00	0.00	0.0%
19	Koneig, John	0.00	0.00	0.00	0.0%
20	Burke, James	0.00	0.00	0.00	0.0%
21	Knight, Paula	0.00	0.00	0.00	0.0%
23	Lodge, John	0.00	0.00	0.00	0.0%
24	IBM Corporation	0.00	0.00	0.00	0.0%
26	Smith, John	0.00	0.00	0.00	0.0%
		11,350.00	210,150.00	-198,800.00	-94.6%

Report Menu Name

Header - Giving Increase (Decrease) For Previous Two Calendar Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show an alphabetical listing by constituent name of the increase in giving between the previous two calendar years for each constituent. The percent of increase or decrease is also shown. A decrease in giving between the two years will be shown as a negative number.

01/28/2018 **Header - Giving Increase (Decrease) For Previous Two Calendar Years** Page 1

All Constituents

ID	Giving Entity	2017	2016	Increase/Decrease	% Increase/Decrease
32	Intrepid Systems Inc.	1,200.00	5,000.00	-3,800.00	-76.0%
28	Bach Memorial Account	500.00	0.00	500.00	100.0%
15	Baker, Thomas	750.00	2,600.00	-1,850.00	-71.2%
18	Bowie, Denise	8,450.00	0.00	8,450.00	100.0%
1	Burke, James	800.00	500.00	300.00	60.0%
20	Burke, James	0.00	0.00	0.00	0.0%
27	The Corporation For Public Broadcasting	50,000.00	0.00	50,000.00	100.0%
11	Decca Records	0.00	0.00	0.00	0.0%
17	Foster, James	450.00	0.00	450.00	100.0%
4	Gore, Martin L.	0.00	0.00	0.00	0.0%
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	-108,000.00	-100.0%
24	IBM Corporation	0.00	0.00	0.00	0.0%
12	Hayward, Justin	9,700.00	8,000.00	1,700.00	21.3%
2	Progressive Music, Inc.	0.00	0.00	0.00	0.0%
3	Trek Foundation	0.00	0.00	0.00	0.0%
21	Knight, Paula	0.00	0.00	0.00	0.0%
19	Koneig, John	0.00	0.00	0.00	0.0%
13	Lennon, John	0.00	0.00	0.00	0.0%
23	Lodge, John	0.00	0.00	0.00	0.0%
6	1984 Productions	0.00	0.00	0.00	0.0%
5	Mozart Memorial Account	0.00	0.00	0.00	0.0%
53	Musk, Elon	17,000.00	12,500.00	4,500.00	36.0%
7	Schmidt Aeronautic Foundation	600.00	0.00	600.00	100.0%
8	Scott, Montgomery	0.00	0.00	0.00	0.0%
26	Smith, John	0.00	0.00	0.00	0.0%
10	Waters, Roger	4,000.00	0.00	4,000.00	100.0%
		93,450.00	136,600.00	-43,150.00	-31.6%

Report Menu Name

Header - Giving Increase (Decrease) For Previous Two Fiscal Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show an alphabetical listing by constituent name of the increase in giving between the previous two fiscal years for each constituent. The percent of increase or decrease is also shown. A decrease in giving between the two years will be shown as a negative number.

01/28/2018 **Header - Giving Increase (Decrease) For Previous Two Fiscal Years** **Page 1**

All Constituents

ID	Giving Entity	2017	2016	Increase/Decrease	% Increase/Decrease
6	1984 Productions	0.00	0.00	0.00	0.0%
28	Bach Memorial Account	500.00	0.00	500.00	100.0%
15	Baker, Thomas	750.00	3,100.00	-2,350.00	-75.8%
18	Bowie, Denise	8,450.00	0.00	8,450.00	100.0%
1	Burke, James	0.00	500.00	-500.00	-100.0%
20	Burke, James	0.00	0.00	0.00	0.0%
11	Decca Records	0.00	0.00	0.00	0.0%
17	Foster, James	450.00	0.00	450.00	100.0%
4	Gore, Martin L.	0.00	0.00	0.00	0.0%
12	Hayward, Justin	17,700.00	7,500.00	10,200.00	136.0%
24	IBM Corporation	0.00	0.00	0.00	0.0%
32	Intrepid Systems Inc.	6,200.00	2,000.00	4,200.00	210.0%
21	Knight, Paula	0.00	0.00	0.00	0.0%
19	Koneig, John	0.00	0.00	0.00	0.0%
13	Lennon, John	0.00	0.00	0.00	0.0%
23	Lodge, John	0.00	0.00	0.00	0.0%
5	Mozart Memorial Account	0.00	0.00	0.00	0.0%
53	Musk, Elon	13,500.00	11,000.00	2,500.00	22.7%
29	Northern Songs Limited, (U.S. Division)	108,000.00	70,000.00	38,000.00	54.3%
2	Progressive Music, Inc.	0.00	0.00	0.00	0.0%
7	Schmidt Aeronautic Foundation	600.00	0.00	600.00	100.0%
8	Scott, Montgomery	0.00	0.00	0.00	0.0%
26	Smith, John	0.00	0.00	0.00	0.0%
27	The Corporation For Public Broadcasting	50,000.00	0.00	50,000.00	100.0%
3	Trek Foundation	0.00	0.00	0.00	0.0%
10	Waters, Roger	4,000.00	0.00	4,000.00	100.0%
		210,150.00	94,100.00	116,050.00	123.3%

Report Menu Name

Header - Honor/Memorial Report, All Memorials

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will show the giving information for your memorial accounts. In DonorQuest, memorials are stored as specially coded constituent accounts. They are given a Donor Type code of "M" for memorial. This report will allow you to see all the donors giving to each memorial, and how much they have given. A running total giving for each memorial is also shown. If this report is run directly (outside of a selection result) it will automatically only show constituent accounts coded as memorials.

01/28/2018 Header - Honor/Memorial Report, All Memorials Page 1

All Memorials

ID	Donor Type	In Honor/Memory Of	Memorial Total	Name and address of Giver(s)	Date	Amount	Type	Stimulus	Donation Fund
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	10,000.00	John Lodge 71828 One Way Yuba City, CA 95991-3171	01/23/2015	5,000.00	CA	UNSOL	5000
				Denise Bowie 123 First Avenue San Jose, CA 95119-2312	01/05/2015	5,000.00	CA	UNSOL	5000
5	Memorial Record	Wolfgang Amadeus Mozart Mozart Memorial Account	17,500.00	Roger Waters 1234 Beyond The Wall Way San Mateo, CA 94403	11/24/2014	10,000.00	CA	UNSOL	5000
				John Lodge 71828 One Way Yuba City, CA 95991-3171	11/24/2014	7,500.00	VC	UNSOL	5000
			27,500.00						

Report Menu Name

Header - Honor/Memorial Report, All Memorials, No Amounts Shown

Description

Designed to be run directly or used with a Header-based Selection Result, this is a variation of the standard memorial report designed to be shown to the families of memorials. It will automatically do a page break between memorial accounts, show the name and address of givers to each memorial, but it will omit how much they gave. If this report is run directly (outside of a selection result) it will automatically only show constituent accounts coded as memorials.

01/28/2018 **Header - Honor/Memorial Report, All Memorials, No Amounts Shown** **Page 2**

All Constituents

ID	Donor Type	In Honor/Memory Of	Name and address of Giver(s)
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	John Lodge 71828 One Way Yuba City, CA 95991-3171 Denise Bowie 123 First Avenue San Jose, CA 95119-2312

Report Menu Name

Header - Honor/Memorial Report, All Memorials, Total Amounts Only

Description

Designed to be run directly or used with a Header-based Selection Result, this variation of the standard memorial report will show the total amount given so far to each memorial, and the name and address of each donor. However, the amounts given by each donor will not be shown.

01/28/2018 | Header - Honor/Memorial Report, All Memorials, Total Amounts Only | Page 1

All Memorials

ID	Donor Type	In Honor/Memory Of	Memorial Total	Name and address of Giver(s)
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	10,000.00	John Lodge 71828 One Way Yuba City, CA 95991-3171 Denise Bowie 123 First Avenue San Jose, CA 95119-2312
5	Memorial Record	Wolfgang Amadeus Mozart Mozart Memorial Account	17,500.00	Roger Waters 1234 Beyond The Wall Way San Mateo, CA 94403 John Lodge 71828 One Way Yuba City, CA 95991-3171
			27,500.00	

Report Menu Name

Header - Honor/Memorial Report, All Memorials, Total Amounts Only, Page Eject

Description

This is just like the, "Header - Honor/Memorial Report, All Memorials, Total Amounts Only" report layout shown above, but it includes a page eject between memorial accounts.

01/28/2018 **Header - Honor/Memorial Report, All Memorials, Total Amounts Only, Page Eject** **Page 1**

All Memorials

ID	Donor Type	In Honor/Memory Of	Memorial Total	Name and address of Giver(s)
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	10,000.00	John Lodge 71828 One Way Yuba City, CA 95991-3171 Denise Bowie 123 First Avenue San Jose, CA 95119-2312

Report Menu Name

Header - Honor/Memorial Report, Specific Time Period

Description

This is a variation of the, "Header - Honor/Memorial Report, All Memorials" report (shown above) which is designed to be copied and customized to show only memorial donations from a specific date forwards. On the DonorQuest report menu you may click the Copy button to make a copy of the report, then click the Setup button to customize the new version you have made. From there, simply change the date used on the report setup Options tab.

01/28/2018 Header - Honor/Memorial Report, Specific Time Period Page 1

Donations From 01/01/2015 .. Present Day

ID	Donor Type	In Honor/Memory Of	Memorial Total	Giver(s)	Date	Amount	Type	Stimulus	Donation Fund
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	10,000.00	John Lodge 71828 One Way Yuba City, CA 95991-3171	01/23/2015	5,000.00	CA	UNSOL	5000
				Denise Bowie 123 First Avenue San Jose, CA 95119-2312	01/05/2015	5,000.00	CA	UNSOL	5000
			10,000.00			10,000.00			

Report Menu Name

Header - Honor/Memorial Report, Specific Time Period, No Amounts Shown

Description

This is a variation of the, "Header - Honor/Memorial Report, All Memorials, No Amounts Shown" report (shown above) which is designed to be copied and customized to show only memorial donations from a specific date forwards.

01/28/2018 **Header - Honor/Memorial Report, Specific Time Period, No Amounts Shown** **Page 1**

Donations From 01/01/2015 To 01/28/2018

ID	Donor Type	In Honor/Memory Of	Name and address of Giver
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	John Lodge 71828 One Way Yuba City, CA 95991-3171
			Denise Bowie 123 First Avenue San Jose, CA 95119-2312

Report Menu Name

Header - Honor/Memorial Report, Specific Time Period, Totals Only

Description

This is a variation of the, "Header - Honor/Memorial Report, Totals Only" report (shown above) which is designed to be copied and customized to show only memorial donations from a specific date forwards.

02/24/2018 Header - Honor/Memorial Report, Specific Time Period, Totals Only Page 1

Donations From 01/01/2015 To Present Day

ID	Donor Type	In Honor/Memory Of	Memorial Total	Name and address of Giver
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	$10,000.00	John Lodge 71828 One Way Yuba City, CA 95991-3171 Denise Bowie 123 First Avenue San Jose, CA 95119-2312
			$10,000.00	

Report Menu Name

Header - Honor/Memorial Report, Specific Time Period, Totals Only, Page Eject

Description

This is a variation of the, "Header - Honor/Memorial Report, All Memorials, Total Amounts Only, Page Eject" report (shown above) which is designed to be copied and customized to show only memorial donations from a specific date forwards.

02/24/2018 **Header - Honor/Memorial Report, Specific Time Period, Totals Only, Page Eject** **Page 1**

Donations From 01/01/2015 To 02/24/2018

ID	Donor Type	In Honor/Memory Of	Memorial Total	Name and address of Giver
28	Memorial Record	Johann Sebastian Bach Bach Memorial Account	$10,000.00	John Lodge 71828 One Way Yuba City, CA 95991-3171 Denise Bowie 123 First Avenue San Jose, CA 95119-2312

Report Menu Name

Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail

Description

Designed to be used with a Header-based Selection Result, this report layout will show the donation detail for the last two calendar years of giving for each constituent, the total for the past two calendar years, along with the increase (or decrease) between the years. What makes this report really special is that it is able to order the constituents by this difference. The grand totals at the bottom of the report let you see whether in the aggregate your organization saw an increase or decrease in total giving across all the constituents included on the report. You would normally use a Selection Result with the report to control which constituents appear on the report. There is also a Fiscal Year version of this report (shown further below).

02/24/2018 Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail Page 1
Donors With Giving In Calendar 2016 or 2017

ID	Giving Entity	Date	Amount	2016 Calendar Total	2017 Calendar Total	Increase/Decrease	Lifetime Total
27	The Corporation For Public Broadcasting	03/31/2017	50,000.00	0.00	70,000.00	70,000.00	70,000.00
		03/01/2017	20,000.00				
18	Bowie, Denise	03/31/2017	8,450.00	0.00	8,450.00	8,450.00	20,950.00
53	Musk, Elon	12/15/2017	1,000.00	12,500.00	20,000.00	7,500.00	48,000.00
		12/15/2017	10,000.00				
		11/15/2017	1,000.00				
		10/15/2017	1,000.00				
		03/10/2017	7,000.00				
		12/10/2016	6,500.00				
		03/29/2016	6,000.00				
10	Waters, Roger	03/31/2017	4,000.00	0.00	4,000.00	4,000.00	20,250.00
12	Hayward, Justin	03/26/2017	9,700.00	8,000.00	9,700.00	1,700.00	94,010.00
		10/26/2016	8,000.00				
7	Schmidt Aeronautic Foundation	01/05/2017	600.00	0.00	600.00	600.00	6,700.00
28	Bach Memorial Account	04/15/2017	500.00	0.00	500.00	500.00	1,250.00
17	Foster, James	01/30/2017	450.00	0.00	450.00	450.00	1,625.00
20	Burke, James	12/31/2017	800.00	500.00	800.00	300.00	24,014.00
		02/24/2016	500.00				
11	Decca Records	09/01/2016	500.00	500.00	0.00	-500.00	1,350.00
15	Baker, Thomas	03/31/2017	750.00	2,600.00	750.00	-1,850.00	21,550.00
		05/10/2016	100.00				
		01/22/2016	2,500.00				
32	Intrepid Systems Inc.	04/25/2017	100.00	5,000.00	1,200.00	-3,800.00	33,100.00
		04/25/2017	100.00				
		03/04/2017	1,000.00				
		11/15/2016	5,000.00				
29	Northern Songs Limited, (U.S. Division)	10/01/2017	500.00	108,000.00	500.00	-107,500.00	344,000.00
		11/20/2016	14,000.00				
		11/03/2016	24,000.00				
		11/02/2016	45,000.00				
		11/01/2016	25,000.00				
			254,050.00	137,100.00	116,950.00	-20,150.00	686,799.00

Report Menu Name

Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease, With Counts

Description

This is essentially a summary version of the, "Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail" report (shown above). It omits the donation detail, using just a single line for each constituent showing totals for the previous two calendar years, along with the increase (or decrease) in giving between the years. In addition, this report will count the number of donors who increased giving between the years, stayed the same, or decreased. The grand totals at the bottom of the report let you see whether in the aggregate your organization saw an increase or decrease in total giving across all the constituents included on the report. You would normally use a Selection Result with the report to control which constituents appear on the report. There is also a Fiscal Year version of this report (shown further below).

02/24/2018 Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease, With Counts Page 1

Donors With Giving In Calendar 2016 or 2017

ID	Giving Entity	2016 Calendar Total	2017 Calendar Total	Increase/Decrease	Increase	Same	Decrease	Lifetime Total
27	The Corporation For Public Broadcasting	0.00	70,000.00	70,000.00	1	0	0	70,000.00
18	Bowie, Denise	0.00	8,450.00	8,450.00	1	0	0	20,950.00
53	Musk, Elon	12,500.00	20,000.00	7,500.00	1	0	0	48,000.00
10	Waters, Roger	0.00	4,000.00	4,000.00	1	0	0	20,250.00
12	Hayward, Justin	8,000.00	9,700.00	1,700.00	1	0	0	94,010.00
7	Schmidt Aeronautic Foundation	0.00	600.00	600.00	1	0	0	6,700.00
28	Bach Memorial Account	0.00	500.00	500.00	1	0	0	1,250.00
17	Foster, James	0.00	450.00	450.00	1	0	0	1,625.00
20	Burke, James	500.00	800.00	300.00	1	0	0	24,014.00
11	Decca Records	500.00	0.00	-500.00	0	0	1	1,350.00
15	Baker, Thomas	2,600.00	750.00	-1,850.00	0	0	1	21,550.00
32	Intrepid Systems Inc.	5,000.00	1,200.00	-3,800.00	0	0	1	33,100.00
29	Northern Songs Limited, (U.S. Division)	108,000.00	500.00	-107,500.00	0	0	1	344,000.00
		137,100.00	116,950.00	-20,150.00	9	0	4	686,799.00

Report Menu Name

Header - Last Two Calendar Years Of Donations, Sorted By Zip With Detail

Description

This is a variation of the, "Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail" report (shown above) with the constituent accounts ordered by zip code. There is also a Fiscal Year version of this report (shown further below).

02/24/2018 **Header - Last Two Calendar Years Of Donations, Sorted By Zip With Detail** **Page 1**

Donors With Giving In Calendar 2016 or 2017

Zip	ID	Giving Entity	Date	Amount	2016 Total	2017 Total	Increase/Decrease	Lifetime Total
94161-2323	29	Northern Songs Limited, (U.S. Division)	10/01/2017	500.00	108,000.00	500.00	-107,500.00	344,000.00
			11/20/2016	14,000.00				
			11/03/2016	24,000.00				
			11/02/2016	45,000.00				
			11/01/2016	25,000.00				
94175	27	The Corporation For Public Broadcasting	03/31/2017	50,000.00	0.00	70,000.00	70,000.00	70,000.00
			03/01/2017	20,000.00				
94300-2112	11	Decca Records	09/01/2016	500.00	500.00	0.00	-500.00	1,350.00
94304-7899	20	Burke, James	12/31/2017	800.00	500.00	800.00	300.00	24,014.00
			02/24/2016	500.00				
94403	10	Waters, Roger	03/31/2017	4,000.00	0.00	4,000.00	4,000.00	20,250.00
94538	53	Musk, Elon	12/15/2017	1,000.00	12,500.00	20,000.00	7,500.00	48,000.00
			12/15/2017	10,000.00				
			11/15/2017	1,000.00				
			10/15/2017	1,000.00				
			03/10/2017	7,000.00				
			12/10/2016	6,500.00				
			03/29/2016	6,000.00				
95070-1234	7	Schmidt Aeronautic Foundation	01/05/2017	600.00	0.00	600.00	600.00	6,700.00
95070-3212	17	Foster, James	01/30/2017	450.00	0.00	450.00	450.00	1,625.00
95112-3211	15	Baker, Thomas	03/31/2017	750.00	2,600.00	750.00	-1,850.00	21,550.00
			05/10/2016	100.00				
			01/22/2016	2,500.00				
95119-2312	18	Bowie, Denise	03/31/2017	8,450.00	0.00	8,450.00	8,450.00	20,950.00
98109	32	Intrepid Systems Inc.	04/25/2017	100.00	5,000.00	1,200.00	-3,800.00	33,100.00
			04/25/2017	100.00				
			03/04/2017	1,000.00				
			11/15/2016	5,000.00				
98109	28	Bach Memorial Account	04/15/2017	500.00	0.00	500.00	500.00	1,250.00
98109	12	Hayward, Justin	03/26/2017	9,700.00	8,000.00	9,700.00	1,700.00	94,010.00
			10/26/2016	8,000.00				
				254,050.00	137,100.00	116,950.00	-20,150.00	686,799.00

Report Menu Name

Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease With Detail

Description

Designed to be used with a Header-based Selection Result, this report layout will show the donation detail for the last two fiscal years of giving for each constituent, the total for the past two fiscal years, along with the increase (or decrease) between the years. What makes this report really special is that it is able to order the constituents by this difference. The grand totals at the bottom of the report let you see whether in the aggregate your organization saw an increase or decrease in total giving across all the constituents included on the report. You would normally use a Selection Result with the report to control which constituents appear on the report. There is also a Calendar Year version of this report (shown further above).

02/24/2018 **Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease With Detail** **Page 1**

Donors With Giving In FY 16 or FY 17

ID	Giving Entity	Date	Amount	2016 Fiscal Total	2017 Fiscal Total	Increase/Decrease	Lifetime Total
27	The Corporation For Public Broadcasting	03/31/2017	50,000.00	0.00	70,000.00	70,000.00	70,000.00
		03/01/2017	20,000.00				
29	Northern Songs Limited, (U.S. Division)	11/20/2016	14,000.00	70,000.00	108,000.00	38,000.00	344,000.00
		11/03/2016	24,000.00				
		11/02/2016	45,000.00				
		11/01/2016	25,000.00				
		10/01/2015	70,000.00				
12	Hayward, Justin	03/26/2017	9,700.00	7,500.00	17,700.00	10,200.00	94,010.00
		10/26/2016	8,000.00				
		09/26/2015	7,500.00				
18	Bowie, Denise	03/31/2017	8,450.00	0.00	8,450.00	8,450.00	20,950.00
32	Intrepid Systems Inc.	04/25/2017	100.00	2,000.00	6,200.00	4,200.00	33,100.00
		04/25/2017	100.00				
		03/04/2017	1,000.00				
		11/15/2016	5,000.00				
		08/31/2015	2,000.00				
10	Waters, Roger	03/31/2017	4,000.00	0.00	4,000.00	4,000.00	20,250.00
53	Musk, Elon	03/10/2017	7,000.00	11,000.00	13,500.00	2,500.00	48,000.00
		12/10/2016	6,500.00				
		03/29/2016	6,000.00				
		12/08/2015	5,000.00				
7	Schmidt Aeronautic Foundation	01/05/2017	600.00	0.00	600.00	600.00	6,700.00
28	Bach Memorial Account	04/15/2017	500.00	0.00	500.00	500.00	1,250.00
11	Decca Records	09/01/2016	500.00	0.00	500.00	500.00	1,350.00
17	Foster, James	01/30/2017	450.00	0.00	450.00	450.00	1,625.00
20	Burke, James	02/24/2016	500.00	500.00	0.00	-500.00	24,014.00
15	Baker, Thomas	03/31/2017	750.00	3,100.00	750.00	-2,350.00	21,550.00
		05/10/2016	100.00				
		01/22/2016	2,500.00				
		11/06/2015	100.00				
		10/06/2015	100.00				
		09/06/2015	100.00				
		08/06/2015	100.00				
		07/07/2015	100.00				
			324,750.00	94,100.00	230,650.00	136,550.00	686,799.00

Report Menu Name

Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease, With Counts

Description

This is essentially a summary version of the, "Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail" report (shown above). It omits the donation detail, using just a single line for each constituent showing totals for the previous two fiscal years, along with the increase (or decrease) in giving between the years. In addition, this report will count the number of donors who increased giving between the years, stayed the same, or decreased. The grand totals at the bottom of the report let you see whether in the aggregate your organization saw an increase or decrease in total giving across all the constituents included on the report. You would normally use a Selection Result with the report to control which constituents appear on the report. There is also a Calendar Year version of this report (shown further above).

02/24/2018 **Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease, With Counts** Page 1

Donors With Giving In FY 16 or FY 17

ID	Giving Entity	2016 Fiscal Total	2017 Fiscal Total	Increase/Decrease	Increase	Same	Decrease	Lifetime Total
27	The Corporation For Public Broadcasting	0.00	70,000.00	70,000.00	1	0	0	70,000.00
29	Northern Songs Limited, (U.S. Division)	70,000.00	108,000.00	38,000.00	1	0	0	344,000.00
12	Hayward, Justin	7,500.00	17,700.00	10,200.00	1	0	0	94,010.00
18	Bowie, Denise	0.00	8,450.00	8,450.00	1	0	0	20,950.00
32	Intrepid Systems Inc.	2,000.00	6,200.00	4,200.00	1	0	0	33,100.00
10	Waters, Roger	0.00	4,000.00	4,000.00	1	0	0	20,250.00
53	Musk, Elon	11,000.00	13,500.00	2,500.00	1	0	0	48,000.00
7	Schmidt Aeronautic Foundation	0.00	600.00	600.00	1	0	0	6,700.00
28	Bach Memorial Account	0.00	500.00	500.00	1	0	0	1,250.00
11	Decca Records	0.00	500.00	500.00	1	0	0	1,350.00
17	Foster, James	0.00	450.00	450.00	1	0	0	1,625.00
20	Burke, James	500.00	0.00	-500.00	0	0	1	24,014.00
15	Baker, Thomas	3,100.00	750.00	-2,350.00	0	0	1	21,550.00
		94,100.00	230,650.00	136,550.00	11	0	2	686,799.00

Report Menu Name

Header - Last Two Fiscal Years Of Donations, Sorted By Zip With Detail

Description

This is a variation of the, "Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease With Detail" report (shown above) with the constituent accounts ordered by zip code. There is also a Fiscal Year version of this report (shown further below).

02/24/2018 — Header - Last Two Fiscal Years Of Donations, Sorted By Zip With Detail — Page 1

Donors With Giving In FY 16 or FY 17

Zip	ID	Giving Entity	Date	Amount	2016 Fiscal Total	2017 Fiscal Total	Increase/Decrease	Lifetime Total
94161-2323	29	Northern Songs Limited, (U.S. Division)	11/20/2016	14,000.00	70,000.00	108,000.00	38,000.00	344,000.00
			11/03/2016	24,000.00				
			11/02/2016	45,000.00				
			11/01/2016	25,000.00				
			10/01/2015	70,000.00				
94175	27	The Corporation For Public Broadcasting	03/31/2017	50,000.00	0.00	70,000.00	70,000.00	70,000.00
			03/01/2017	20,000.00				
94300-2112	11	Decca Records	09/01/2016	500.00	0.00	500.00	500.00	1,350.00
94304-7899	20	Burke, James	02/24/2016	500.00	500.00	0.00	-500.00	24,014.00
94403	10	Waters, Roger	03/31/2017	4,000.00	0.00	4,000.00	4,000.00	20,250.00
94538	53	Musk, Elon	03/10/2017	7,000.00	11,000.00	13,500.00	2,500.00	48,000.00
			12/10/2016	6,500.00				
			03/29/2016	6,000.00				
			12/08/2015	5,000.00				
95070-1234	7	Schmidt Aeronautic Foundation	01/05/2017	600.00	0.00	600.00	600.00	6,700.00
95070-3212	17	Foster, James	01/30/2017	450.00	0.00	450.00	450.00	1,625.00
95112-3211	15	Baker, Thomas	03/31/2017	750.00	3,100.00	750.00	-2,350.00	21,550.00
			05/10/2016	100.00				
			01/22/2016	2,500.00				
			11/06/2015	100.00				
			10/06/2015	100.00				
			09/06/2015	100.00				
			08/06/2015	100.00				
			07/07/2015	100.00				
95119-2312	18	Bowie, Denise	03/31/2017	8,450.00	0.00	8,450.00	8,450.00	20,950.00
98109	32	Intrepid Systems Inc.	04/25/2017	100.00	2,000.00	6,200.00	4,200.00	33,100.00
			04/25/2017	100.00				
			03/04/2017	1,000.00				
			11/15/2016	5,000.00				
			08/31/2015	2,000.00				
98109	28	Bach Memorial Account	04/15/2017	500.00	0.00	500.00	500.00	1,250.00
98109	12	Hayward, Justin	03/26/2017	9,700.00	7,500.00	17,700.00	10,200.00	94,010.00
			10/26/2016	8,000.00				
			09/26/2015	7,500.00				
				324,750.00	94,100.00	230,650.00	136,550.00	686,799.00

Report Menu Name

Header - Lifetime Donation Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will show the primary constituent name, organization name (if constituent is an organization), address, and lifetime giving. The example below shows the report being used with a selection of all donors with giving in FY 17 or 18.

02/05/2018 | Header - Lifetime Donation Totals | Page 1

Donors With Giving In FY 17 or FY 18

Organization Name	Last Name	First Name	Address	City	State	Zip	Lifetime Donation Total
	Baker	Thomas	4968 Tardis Ave.	San Jose	CA	95112-3211	21,550.00
	Bowie	Denise	123 First Avenue	San Jose	CA	95119-2312	20,950.00
	Burke	James	826 Connections Way	Palo Alto	CA	94304-7899	15,100.00
	Foster	James	14552 Medical Dr.	Saratoga	CA	95070-3212	1,625.00
	Waters	Roger	1234 Beyond The Wall W	San Mateo	CA	94403	20,250.00
Bach Memorial Account	Bach	Johann	3543 Brandenburg Way	Seattle	WA	98109	1,250.00
Intrepid Systems Inc.	Anderson	Brad	701 Galer St.	Seattle	WA	98109	33,100.00
Northern Songs Limited, (	Harrison	George	234 Abbey Road	San Francisco	CA	94161-2323	343,500.00
Schmidt Aeronautic Foun	Schmidt	Christopher	368 Moore Ave.	Saratoga	CA	95070-1234	6,700.00
SpaceX	Musk	Elon	3141 Tesla Ave.	Fremont	CA	94538	39,000.00
The Corporation For Publi	Burke	James	1105 Information Avenue	San Francisco	CA	94175	50,000.00
Threshold Records	Hayward	Justin	1701 Enterprise Way	Seattle	WA	98109	94,010.00
							647,035.00

Report Menu Name

Header - Lifetime Donation Totals With Pledges

Description

Designed to be used with a Header-based Selection Result, this report layout will show the primary constituent name, organization name (if constituent is an organization), Constituent ID, and three special total columns. The Total Gifts & Pledges column is the total of all outright gifts, plus all pledges not written off. So it is the maximum received and expected revenue from each donor if they honor all outstanding pledges they have. The Outstanding Pledge Amounts column is the total the donor has yet to pay on all pledges not written off. Finally, the Actual Revenue column shows the total of all outright gifts plus all pledge payments to date. The example below shows the report being used with a selection of all donors with giving in FY 17 or 18.

02/05/2018 Header - Lifetime Donation Totals With Pledges Page 1
Donors With Giving In FY 17 or FY 18

Organization Name	Last Name	First Name	ID Num	Total Gifts & Pledges	Outstanding Pledge Amounts	Actual Revenue
	Baker	Thomas	15	25,250.00	3,700.00	21,550.00
	Bowie	Denise	18	18,000.00	-2,950.00	20,950.00
	Burke	James	1	15,600.00	500.00	15,100.00
	Foster	James	17	1,725.00	100.00	1,625.00
	Waters	Roger	10	27,000.00	6,750.00	20,250.00
Bach Memorial Account	Bach	Johann	28	2,500.00	1,250.00	1,250.00
Intrepid Systems Inc.	Anderson	Brad	32	64,050.69	30,950.69	33,100.00
Northern Songs Limited, (U.S. Division)	Harrison	George	29	343,500.00	0.00	343,500.00
Schmidt Aeronautic Foundation	Schmidt	Christopher	7	7,900.00	1,200.00	6,700.00
SpaceX	Musk	Elon	53	39,000.00	0.00	39,000.00
The Corporation For Public Broadcasting	Burke	James	27	50,000.00	0.00	50,000.00
Threshold Records	Hayward	Justin	12	108,010.00	25,000.00	83,010.00
				702,535.69	66,500.69	636,035.00

Report Menu Name

Header - Lifetime Totals by Donor Type, Including Any Outstanding Pledge Balances

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will show three special totals by Donor Type. This is a summary report, so each line will represent the totals for many constituents within each Donor Type (Corporations, Individuals, etc.) The Total Gifts & Pledges column is the total of all outright gifts, plus all pledges not written off. So it is the maximum received and expected revenue from each donor if they honor all outstanding pledges they have. The Outstanding Pledge Amounts column is the total the donor has yet to pay on all pledges not written off. Finally, the Actual Revenue column shows the total of all outright gifts plus all pledge payments to date. The example below shows the report being used with a selection of all donors with giving in FY 17 or 18, but you could also run the report on a much broader selection, or even directly (outside of a Selection Result) and let it report on your entire database since it is a summary report and would take a page or so even if you have hundreds of thousands of constituents in your database.

02/05/2018 **Header - Lifetime Totals by Donor Type, Including Any Outstanding Pledge Balances** **Page 1**

Donors With Giving In FY 17 or FY 18

Donor Type	Total Gifts & Pledges	Outstanding Pledge Amounts	Actual Revenue
Corporation	393,500.00	0.00	393,500.00
Church	64,050.69	30,950.69	33,100.00
Foundation	7,900.00	1,200.00	6,700.00
Individual	234,585.00	33,100.00	201,485.00
Memorial Record	2,500.00	1,250.00	1,250.00
	702,535.69	66,500.69	636,035.00

Report Menu Name

Header - Linked Donor Report, All Linkages For Donor

Description

Designed to be used with a Header-based Selection Result, this report layout will show all linkages (relationships to other constituents) for each constituent on the report.

02/05/2018 Header - Linked Donor Report, All Linkages For Donor Page 1
Donors With Giving In FY 17 or FY 18

ID	Giving Entity	Linkage	Description	Linked To:
32	Intrepid Systems Inc.	FRIEND MG50	Friend Matching Gift 50%	Burke, James IBM Corporation
28	Bach Memorial Account			
15	Baker, Thomas	FRIEND MG50	Friend Matching Gift 50%	Hayward, Justin IBM Corporation
18	Bowie, Denise			
1	Burke, James			
27	The Corporation For Public Broadcasting			
17	Foster, James			
29	Northern Songs Limited, (U.S. Division)	FRIEND	Friend	Hayward, Justin
12	Hayward, Justin	CLASSI FRIEND FRIEND MG50	Classical Influence Friend Friend Matching Gift 50%	Bach Memorial Account Baker, Thomas Northern Songs Limited, (U.S. Division) Decca Records
53	Musk, Elon			
7	Schmidt Aeronautic Foundation			
10	Waters, Roger			

Report Menu Name

Header - LYBUNT Report

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will show the constituent ID, Type, and Name, along with the donations they gave last year. LYBUNT is a term commonly used among nonprofits. It means donors who gave last year, but not this year.

02/25/2018 **Header - LYBUNT Report** Page 1

LYBUNT Donors Based On Calendar Year Totals

ID	Donor Type	Giving Entity	Date	Regular Gifts	In-kind Gifts	Type	Stimulus	Comments
7	Foundation	Schmidt Aeronautic Foundation	01/05/2017	600.00		CK	UNSOL	
12	Individual	Hayward, Justin	03/26/2017	9,700.00		CA	17AC	Any general comment can go here.
15	Individual	Baker, Thomas	03/31/2017	750.00		CA	17AC	
					20.00			
17	Individual	Foster, James	01/30/2017	450.00		CK	17AC	
18	Individual	Bowie, Denise	03/31/2017	8,450.00		CK	17AC	
20	Individual	Burke, James	12/31/2017	800.00		VC	17AC	
27	Corporation	The Corporation For Public Broadcasting	03/31/2017	50,000.00		CK	17AC	
28	Memorial Record	Bach Memorial Account	04/15/2017	500.00		CA	17AC	
29	Corporation	Northern Songs Limited, (U.S. Division)	10/01/2017	500.00		CK	SE	
10	Individual	Waters, Roger	03/31/2017	4,000.00		CK	17AC	
				75,750.00				

Report Menu Name

Header - Memo History Report

Description

Designed to be used with a Header-based Selection Result, this report layout will show all memos for each constituent.

02/05/2018 **Header - Memo History Report** Page 1

Donors With Giving In FY 17 or FY 18

Last Name	First Name	Organization Name	Job Title	Memo Code	Memo Text
Bach	Johann	Bach Memorial Account		S000001	01/30/2000; 00AC; AM1; First mailing for 00AC
Baker	Thomas			S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Bowie	Denise			S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Burke	James			S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Foster	James			S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Hayward	Justin	Threshold Records		FAVCOUNTRY FAV_ALBUM HMTOWN HOBBY MUSIC S000001 S000002 S000004 S000005 SEASON	Norway Days of Future Passed London, England Justin loves to play guitar and compose music on Tuesday Afternoons. Alternative, Progressive, and Classic Rock 09/06/2006; 06AC; AM1; First solicitation for campaign! 01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo Spring -- Likes just when the leaves begin to change color.
Anderson	Brad	Intrepid Systems Inc.	Software Engineer	ADDR3 CUSTOM S000001 TGERMANY	3rd Address Line Can Go Here Memos can be used to add additional fields and information 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 1973
Musk	Elon	SpaceX			
Harrison	George	Northern Songs Limited, (U.S. Division)		S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Schmidt	Christopher	Schmidt Aeronautic Foundation		S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Burke	James	The Corporation For Public Broadcasting		S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo
Waters	Roger			S000001 S000003 S000004	01/30/2000; 00AC; AM1; First mailing for 00AC 04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017 03/17/2017; 17AC; 17ACA1; Demo

Report Menu Name

Header - New Donor Analysis - First Gift Within Past 365 Days, 2nd Gift Within 60 Days Of 1st

Description

Normally run directly (outside of a selection result), this report layout will find all donors who have their first gift within the past 365 days, and who gave a second gift within 60 days of their first gift. The names of constituents meeting these conditions will be shown, along with the date, amount, stimulus, and appeal of their first gift. The same information is shown for their subsequent gift within 60 days. A count of the total number of constituents with second gifts in the 60 day period is also shown. Since you may alternatively use this report layout with a selection result you have created, and that selection may included donors who didn't make a second donation with 60 days of their first, the Count column is associated with an Average column, which in that case would show the percentage of new donors in your selection who gave a second gift within 60 days of their first.

02/26/2018 Header - New Donor Analysis - First Gift Within Past 365 Days, 2nd Gift Within 60 Days Of 1st Page 1

Donors Who Gave 1st Gift Within Past 365 Days, 2nd Gift Within 60 Days of 1st

Giving Entity	First Gift	Amount	Stimulus	Appeal	Next Within 60 Days	Amount	Stimulus	Appeal	Count	Average
The Corporation For Public Broadcasting	03/01/2017	20,000.00	GRANTPAY	APPEAL1	03/31/2017	50,000.00	17AC	APPEAL1		
		20,000.00				50,000.00			1.00	50,000.00

Report Menu Name

Header - New Donors Y-T-D

Description

Normally run directly (outside of a selection result), this report layout will find all donors who have their first gift during the current calendar year. The names of constituents will be shown, along with the date, amount, count, type, account, stimulus, fund, thank-you letter code, and comment of all their gifts so far. Monetary and non-monetary gifts are also shown and totaled separately.

02/26/2018 Header - New Donors Y-T-D Page 1

New Donors Y-T-D

ID	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	TY	Comment
19	Koneig, John	01/15/2018	500.00				CK	123-45-457	SE	STEMSTUD	T1	
			500.00	1		0						

Report Menu Name

Header - New Money Donors, Based On Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show constituents who have given more in the current calendar year than in the previous calendar year:

02/26/2018 Header - New Money Donors, Based On Calendar Year Page 1

New Money Donors (based on calendar year)

Last Name	First Name	Organization Name	2018	2017	New Money
Davidson	Peter	Decca Records	50.00	0.00	50.00
Koneig	John		500.00	0.00	500.00
			550.00	0.00	550.00

Report Menu Name

Header - New Money Donors, Based On Fiscal Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show constituents who have given more in the current fiscal year than in the previous fiscal year:

02/26/2018 **Header - New Money Donors, Based On Fiscal Year** Page 1

New Money Donors (based on fiscal year)

Last Name	First Name	Organization Name	2018	2017	New Money
Burke	James		800.00	0.00	800.00
Koneig	John		500.00	0.00	500.00
Musk	Elon	SpaceX	19,000.00	13,500.00	5,500.00
			20,300.00	13,500.00	6,800.00

Report Menu Name

Header - Notepad Report

Description

Designed to be used with a Header-based Selection Result, this report layout will show the ID, Name, and complete NotePad for each constituent.

02/26/2018 **Header - Notepad Report** **Page 1**

Constituents With A NotePad Entry

ID	Giving Entity	NotePad
32	Intrepid Systems Inc.	Any miscellaneous notes can go here. Click on Window, Tile All Vertically at any time to optimize currently open windows for your screen resolution. Also try the Window, Tile Vertically With Main Window Priority view.
28	Bach Memorial Account	One of the most profoundly inspired and masterful composers in history, Johann Sebastian Bach was born into a musical family in Eisenach, Thuringia - until recently part of East Germany. His father, Johann Ambrosius Bach, was a talented violinist, and taught his son the basic skills of string-playing; another relation, the organist at Eisenach's most important church, instructed the young boy on the organ.
15	Baker, Thomas	The Doctor travels in a Tardis, which is an acronym forTime and Relative Dimensions In Space.
12	Hayward, Justin	Justin is a very accomplished singer/song writer. He is the lead vocalist for the symphonic rock group known as The Moody Blues. Many consider the best works of the Moody Blue to be the efforts made between 1967 and 1970 in which the albums "Days Of Future Passed", "In Search Of The Lost Chord", "On The Threshold Of A Dream", and "To Our Children's Children's Children" were produced. The following is from "To Our Children's Children's Children": Blasting, Billowing, Bursting Forth with the Power of ten billion butterfly sneezes, Man with his flaming pyre has conquered the wayward breezes, Climbing to tranquillity far above the cloud, Perceiving the heavens clear of misty shroud. Higher and Higher now we've learned to play with fire, We go higher and higher and higher. Vast vision must improve our sight and perhaps at last we'll see, An end to our homes endless blight and the beginning of the Free, Climb to tranquility finding its real worth Conceiving the heavens flourishing on Earth. Higher and Higher now we've learned to play with fire, We go higher and higher and higher.

Report Menu Name

Header - Phonathon Sheets

Description

Designed to be used with a Header-based Selection Result, this report layout is designed to be used by volunteers when calling constituents to ask for donations. These forms are meant for telephone campaigns in which volunteers do not have access to a workstation or tablet with DonorQuest, which would allow them to use the Contact Manager in DonorQuest to interactively enter notes while calling constituents. Included on a single sheet of paper is all the basic information for the constituent, including recent giving history. After that are some blanks for the volunteer to record notes about the outcome of a call. This information should be later entered into DonorQuest by someone who does have access to the database.

02/05/2018 **Header - Phonathon Sheets** **Page 3**

Donors With Giving In FY 17 or FY 18

Primary Solicitor:	
Donor ID:	28
Primary Name:	Johann Bach
Secondary Name:	
Organization:	Bach Memorial Account
Address:	3543 Brandenburg Way,
City, State:	Seattle, WA 98109
Home Phone:	(206) 270-1050

PREVIOUS DONATIONS

DATE	AMOUNT	TYPE	STIMULUS	FUND	COMMENT
04/15/2017	500.00	Cash Donation	2017 Annual Campaign	Building Fund	
02/04/2013	250.00	Cash Donation	2013 Annual Campaign	Unrestricted Fund	
01/04/2013	500.00	Cash Donation	2013 Annual Campaign	Unrestricted Fund	

TOTAL GIFTS: 1,250.00
AVERAGE GIFT: 416.67

Volunteer's Name: ____________________

Spoke With: ____________________

Volunteers, Please Check Appropriate Pledge Response Below:
___Yes $______________ (Amount Pledged)
___No
___Maybe
___No Answer
___No number available / Wrong number
___Willing To Volunteer For Future Phonathons Or Mail Outs
___Visa ___Master Card ___American Express ___Other; Card Number:____________________________ Expiration Date: ________

Volunteer's Comments:

____

____

____

____

Report Menu Name

Header - Pledge History Report, All Pledges

Description

Designed to be used with a Header-based Selection Result, this report layout will show all pledges for each constituent.

02/26/2018 **Header - Pledge History Report, All Pledges** Page 1

Constituents With Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amt	Pay Freq	Pledge Stim	Type	Paid	Balance	Past Due	Write Off
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00	No
		09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00	No
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00	No
		05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69	No
		03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00	No
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00	No
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00	No
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00	No
		02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00	No
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00	No
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00	No
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00	No
		03/05/1998	03/05/1999	9,600.00	800.00	Monthly	98SA	GP	9,600.00	0.00	0.00	No
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00	No
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00	No
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00	No
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00	No
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00	No
		03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00	No
		04/02/2008	03/01/2009	11,000.00	1,000.00	Monthly	08AC		11,000.00	0.00	0.00	Yes
		03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00	No
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00	0.00	No
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00	No
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	25,000.00	No
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00	No
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	6,000.00	No
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	500.00	No
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	1,000.00	No
7	Schmidt Aeronautic Foundatio	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00	No
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00	No
				212,310.69	72,758.21				49,860.00	162,450.69	105,400.69	

Report Menu Name

Header - Pledge History Report, All Pledges Not Written Off

Description

Designed to be used with a Header-based Selection Result, this report layout will show only pledges which have not been written off for each constituent.

02/26/2018 **Header - Pledge History Report, All Pledges Not Written Off** **Page 1**

Constituents With Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amt	Pay Freq	Stimulus	Type	Paid	Balance	Past Due
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00
		09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00
		05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69
		03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00
		02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00
		03/05/1998	03/05/1999	9,600.00	800.00	Monthly	98SA	GP	9,600.00	0.00	0.00
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00
		03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00
		03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00	0.00
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	25,000.00
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	6,000.00
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	500.00
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	1,000.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				201,310.69	71,758.21				38,860.00	162,450.69	105,400.69

Report Menu Name

Header - Scheduled Contact Tickler Report By Donor

Description

Designed to be used with a Header-based Selection Result, this report layout will show all scheduled contacts for each constituent. Included are the constituent's ID, full address, Contact Description, Next/Last Dates, Status, and full Notes.

02/26/2018 | **Header - Scheduled Contact Tickler Report By Donor** | Page 1

Constituents With Contacts

ID	Name / Telephone	Description	Next	Last	Status	Notes
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Calling to invite Brad to our major donor thank-you dinner.	02/23/2018	02/15/2018	Open	02/15/2018: Called Brad but got his voicemail. Before transferring me the receptionist said this is a very busy week for him, but that things will be slowing down a lot next week. I left a message inviting him to our major donor thank-you dinner next Friday. I said that I understand he is very busy but we would love to have him and I'll check in one more time with him next week to see how things are going. I think it would be best to try him one more time on the 23rd, just a couple days before our dinner, so I will set my next contact date to the 23rd so DonorQuest will remind me when I come in that morning to give Brad another call.
		Grant Request	04/15/2017	03/15/2017	Open	
		Follow up call	01/14/2015	01/07/2015	Closed	Spoke with Brad. He and his business partner will be attending the fundraiser in the spring.
		Moves Management	08/17/2014	08/10/2014	Closed	Prospect seemed very open to helping with our mission in general. They might be in a position to give us a rather large gift -- possibly a grant -- sometime in the near future -- maybe in a year or so.
20	James Burke H: (415) 555-1212 W:	Sample Contact	03/16/2017	03/09/2017	Open	Scheduled Contacts are used to record and document every contact with your donors. You can schedule these contacts or tasks for yourself or other users of DonorQuest. Phone conversions notes or entire emails may be pasted into the Contact Notes section of the Scheduled Contact.
		Call For Pledge Follow-up	01/28/2014	01/14/2014	Open	James said he would be in a better position to make a pledge in a coupl weeks, so I should call him back then.
27	James Burke The Corporation For Public Broadcasting H: ( ) - W: (415) 555-1234	GRANT	03/29/2017	01/12/2017	Closed	Amount he said may be possible: 25,000.00 Very promising, need to stay on top of this!
11	Peter Davidson Decca Records H: (415) 555-1212 W:	Grant Request	04/06/2017	02/15/2017	Open	12/15/16: Ran into Peter at a local PTA meeting. He said we would be good candidates to receive a grant and that I should give him a call after New Year's. 01/02/17: Call back on February 15th to confirm grant approval. 02/15/17: Spoke with Peter, we got the grant! Should give him a call again in a month to thank him and let him know what a huge difference the money made to our organization.

Report Menu Name

Header - Scheduled Contact Tickler Report By Donor - Most Recent Contact Only

Description

Designed to be used with a Header-based Selection Result, this report layout will show only the most recent scheduled contact for each constituent. Included are the constituent's ID, full address, Contact Description, Next/Last Dates, Status, and full Notes.

02/26/2018 Header - Scheduled Contact Tickler Report By Donor Page 1
Constituents With Contacts

ID	Name / Telephone	Description	Next	Last	Status	Notes
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Calling to invite Brad to our major donor thank-you dinner.	02/23/2018	02/15/2018	Open	02/15/2018: Called Brad but got his voicemail. Before transferring me the receptionist said this is a very busy week for him, but that things will be slowing down a lot next week. I left a message inviting him to our major donor thank-you dinner next Friday. I said that I understand he is very busy but we would love to have him and I'll check in one more time with him next week to see how things are going. I think it would be best to try him one more time on the 23rd, just a couple days before our dinner, so I will set my next contact date to the 23rd so DonorQuest will remind me when I come in that morning to give Brad another call.
20	James Burke H: (415) 555-1212 W:	Sample Contact	03/16/2017	03/09/2017	Open	Scheduled Contacts are used to record and document every contact with your donors. You can schedule these contacts or tasks for yourself or other users of DonorQuest. Phone conversions notes or entire emails may be pasted into the Contact Notes section of the Scheduled Contact.
27	James Burke The Corporation For Public Broadcasting H: ( ) - W: (415) 555-1234	GRANT	03/29/2017	01/12/2017	Closed	Amount he said may be possible: 25,000.00 Very promising, need to stay on top of this!
11	Peter Davidson Decca Records H: (415) 555-1212 W:	Grant Request	04/06/2017	02/15/2017	Open	12/15/16: Ran into Peter at a local PTA meeting. He said we would be good candidates to receive a grant and that I should give him a call after New Year's. 01/02/17: Call back on February 15th to confirm grant approval. 02/15/17: Spoke with Peter, we got the grant! Should give him a call again in a month to thank him and let him know what a huge difference the money made to our organization.
29	George Harrison Northern Songs Limited, (U.S. Division) H: W: (510) 213-2132	GRANT	03/01/2017	02/01/2017	Open	Amount: $3,500.00 Very good grant prospect. Be sure and call them back when DonorQuest reminds me to!
24	Timothy Harrison IBM Corporation H: W: (510) 432-1322	Spring Campaign Call	03/23/2017	03/16/2017	Closed	

Report Menu Name

Header - Solicitor Report

Description

Designed to be used with a Header-based Selection Result, this report layout will show constituents grouped by their assigned solicitor, along with basic contact information, annual income, and target range of giving for each constituent.

02/26/2018 **Header - Solicitor Report** **Page 1**

Donors With Solicitor Assignments

ID	Type	Last, First Name	Organization Name	Home Phone	Work Phone	Marital Status	Do Not Solicit	Annual Income	Target
SOLICITOR: Jim									
15	I	Baker, Thomas		(510) 356-7540	(123) 456-7890 X1234		N	60,000.00	$10,001-$20,000
18	I	Bowie, Denise		(408) 555-1212		Single	N	90,000.00	$10,001-$20,000
20	I	Burke, James		(415) 555-1212			N	80,000.00	$10,001-$20,000
17	I	Foster, James		(510) 213-2132			N	0.00	$20,001-$50,000
2	O	Jarre, Jean-Michel	Progressive Music, Inc.	(206) 555-1212			N	70,000.00	$20,001-$50,000
3	F	Kirk, James	Trek Foundation	(510) 674-3283	(510) 270-1050		N	0.00	
19	O	Koneig, John			(510) 270-0449		N	0.00	
SOLICITOR: Patrick									
32	C	Anderson, Brad	Intrepid Systems Inc.	(800) 555-1212	(800) 952-8228	Married	N	65,000.00	$50,001-Unlimited
4	I	Gore, Martin L.		(415) 555-1212			N	140,000.00	$50,001-Unlimited
29	C	Harrison, George	Northern Songs Limited, (U.S. Division)		(510) 213-2132		N	90,000.00	$5001-$10,000
6	C	McGoohan, Patrick	1984 Productions		(510) 867-4508		N	1,500,000.00	$20,001-$50,000
8	I	Scott, Montgomery		(510) 356-3264			N	900,000.00	$50,001-Unlimited
10	I	Waters, Roger		(808) 555-1212			N	0.00	
SOLICITOR: Robert									
24	C	Harrison, Timothy	IBM Corporation		(510) 432-1322		N	100,000.00	$20,001-$50,000
12	I	Hayward, Justin	Threshold Records	(425) 555-1212	(206) 555-1212 1234		N	120,000.00	$50,001-Unlimited
21	I	Knight, Paula		(510) 555-1212			N	98,765.00	$10,001-$20,000
23	I	Lodge, John	Threshold Records	(510) 159-2654	(408) 555-1212 1234		N	50,000.00	$1-$5000
26	I	Smith, John		(510) 364-3773			N	100,000.00	$50,001-Unlimited
SOLICITOR: Sarah									
27	C	Burke, James	The Corporation For Public Broadcasting	( ) -	(415) 555-1234		N	80,000.00	$10,001-$20,000
11	C	Davidson, Peter	Decca Records	(415) 555-1212			N	50,000.00	$1-$5000
13	I	Lennon, John			(510) 213-2132		N	0.00	
7	F	Schmidt, Christopher	Schmidt Aeronautic Foundation		(510) 867-3966		N	0.00	$20,001-$50,000

Report Menu Name

Header - Solicitor Report With Calendar Totals For Current And Past Three Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show constituents grouped by their assigned solicitor, along with basic contact information and annual giving for the current and past three calendar years.

02/26/2018 Header - Solicitor Report With Calendar Totals For Current And Past Three Years Page 1

Donors With Solicitor Assignments

ID	Type	Last, First Name	Organization Name	Home Phone	Work Phone	Target	2018	2017	2016	2015
SOLICITOR: Jim										
15	I	Baker, Thomas		(510) 356-7540	(123) 456-7890 X1234	$10,001-$20,000	0.00	750.00	2,600.00	2,000.00
18	I	Bowie, Denise		(408) 555-1212		$10,001-$20,000	0.00	8,450.00	0.00	5,500.00
20	I	Burke, James		(415) 555-1212		$10,001-$20,000	0.00	800.00	500.00	0.00
17	I	Foster, James		(510) 213-2132		$20,001-$50,000	0.00	450.00	0.00	0.00
2	O	Jarre, Jean-Michel	Progressive Music, Inc.	(206) 555-1212		$20,001-$50,000	0.00	0.00	0.00	0.00
3	F	Kirk, James	Trek Foundation	(510) 674-3283	(510) 270-1050		0.00	0.00	0.00	0.00
19	O	Koneig, John			(510) 270-0449		500.00	0.00	0.00	0.00
							500.00	10,450.00	3,100.00	7,500.00
SOLICITOR: Patrick										
32	C	Anderson, Brad	Intrepid Systems Inc.	(800) 555-1212	(800) 952-8228	$50,001-Unlimited	500.00	1,200.00	5,000.00	2,000.00
4	I	Gore, Martin L.		(415) 555-1212		$50,001-Unlimited	0.00	0.00	0.00	0.00
29	C	Harrison, George	Northern Songs Limited, (U.S. Division)		(510) 213-2132	$5001-$10,000	0.00	500.00	108,000.00	70,000.00
6	C	McGoohan, Patrick	1984 Productions		(510) 867-4508	$20,001-$50,000	0.00	0.00	0.00	0.00
8	I	Scott, Montgomery		(510) 356-3264		$50,001-Unlimited	0.00	0.00	0.00	0.00
10	I	Waters, Roger		(808) 555-1212			0.00	4,000.00	0.00	0.00
							500.00	5,700.00	113,000.00	72,000.00
SOLICITOR: Robert										
24	C	Harrison, Timothy	IBM Corporation		(510) 432-1322	$20,001-$50,000	0.00	0.00	0.00	0.00
12	I	Hayward, Justin	Threshold Records	(425) 555-1212	(206) 555-1212 1234	$50,001-Unlimited	0.00	9,700.00	8,000.00	7,500.00
21	I	Knight, Paula		(510) 555-1212		$10,001-$20,000	0.00	0.00	0.00	5,000.00
23	I	Lodge, John	Threshold Records	(510) 159-2654	(408) 555-1212 1234	$1-$5000	0.00	0.00	0.00	5,700.00
26	I	Smith, John		(510) 364-3773		$50,001-Unlimited	0.00	0.00	0.00	0.00
							0.00	9,700.00	8,000.00	18,200.00
SOLICITOR: Sarah										
27	C	Burke, James	The Corporation For Public Broadcasting	( ) -	(415) 555-1234	$10,001-$20,000	0.00	70,000.00	0.00	0.00
11	C	Davidson, Peter	Decca Records	(415) 555-1212		$1-$5000	50.00	0.00	500.00	0.00
13	I	Lennon, John			(510) 213-2132		0.00	0.00	0.00	0.00
7	F	Schmidt, Christopher	Schmidt Aeronautic Foundation		(510) 867-3966	$20,001-$50,000	0.00	600.00	0.00	0.00
							50.00	70,600.00	500.00	0.00

Report Menu Name

Header - Solicitor Report With Fiscal Totals For Current And Past Three Years

Description

Designed to be used with a Header-based Selection Result, this report layout will show constituents grouped by their assigned solicitor, along with basic contact information and annual giving for the current and past three fiscal years.

02/26/2018 **Header - Solicitor Report With Fiscal Totals For Current And Past Three Years** Page 1

Donors With Solicitor Assignments

ID	Type	Last, First Name	Organization Name	Home Phone	Work Phone	Target	2018	2017	2016	2015
SOLICITOR: Jim										
15	I	Baker, Thomas		(510) 356-7540	(123) 456-7890 X1234	$10,001-$20,000	0.00	750.00	3,100.00	1,600.00
18	I	Bowie, Denise		(408) 555-1212		$10,001-$20,000	0.00	8,450.00	0.00	5,500.00
20	I	Burke, James		(415) 555-1212		$10,001-$20,000	800.00	0.00	500.00	0.00
17	I	Foster, James		(510) 213-2132		$20,001-$50,000	0.00	450.00	0.00	0.00
2	O	Jarre, Jean-Michel	Progressive Music, Inc.	(206) 555-1212		$20,001-$50,000	0.00	0.00	0.00	0.00
3	F	Kirk, James	Trek Foundation	(510) 674-3283	(510) 270-1050		0.00	0.00	0.00	0.00
19	O	Koneig, John			(510) 270-0449		500.00	0.00	0.00	0.00
							1,300.00	9,650.00	3,600.00	7,100.00
SOLICITOR: Patrick										
32	C	Anderson, Brad	Intrepid Systems Inc.	(800) 555-1212	(800) 952-8228	$50,001-Unlimited	500.00	6,200.00	2,000.00	0.00
4	I	Gore, Martin L.		(415) 555-1212		$50,001-Unlimited	0.00	0.00	0.00	0.00
29	C	Harrison, George	Northern Songs Limited, (U.S. Division)		(510) 213-2132	$5001-$10,000	500.00	108,000.00	70,000.00	50,000.00
6	C	McGoohan, Patrick	1984 Productions		(510) 867-4508	$20,001-$50,000	0.00	0.00	0.00	0.00
8	I	Scott, Montgomery		(510) 356-3264		$50,001-Unlimited	0.00	0.00	0.00	0.00
10	I	Waters, Roger		(808) 555-1212			0.00	4,000.00	0.00	10,000.00
							1,000.00	118,200.00	72,000.00	60,000.00
SOLICITOR: Robert										
24	C	Harrison, Timothy	IBM Corporation		(510) 432-1322	$20,001-$50,000	0.00	0.00	0.00	0.00
12	I	Hayward, Justin	Threshold Records	(425) 555-1212	(206) 555-1212 1234	$50,001-Unlimited	0.00	17,700.00	7,500.00	6,500.00
21	I	Knight, Paula		(510) 555-1212		$10,001-$20,000	0.00	0.00	0.00	5,000.00
23	I	Lodge, John	Threshold Records	(510) 159-2654	(408) 555-1212 1234	$1-$5000	0.00	0.00	0.00	13,200.00
26	I	Smith, John		(510) 364-3773		$50,001-Unlimited	0.00	0.00	0.00	0.00
							0.00	17,700.00	7,500.00	24,700.00
SOLICITOR: Sarah										
27	C	Burke, James	The Corporation For Public Broadcasting	( ) -	(415) 555-1234	$10,001-$20,000	0.00	70,000.00	0.00	0.00
11	C	Davidson, Peter	Decca Records	(415) 555-1212		$1-$5000	50.00	500.00	0.00	0.00
13	I	Lennon, John			(510) 213-2132		0.00	0.00	0.00	5,000.00
7	F	Schmidt, Christopher	Schmidt Aeronautic Foundation		(510) 867-3966	$20,001-$50,000	0.00	600.00	0.00	0.00
							50.00	71,100.00	0.00	5,000.00

Report Menu Name

Header - SYBUNT Report

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will show the constituent ID, Type, and Name, along with their most recent gift. SYBUNT is a term commonly used among nonprofits. It means donors who gave some year in the past, but not this year.

02/26/2018 | Header - SYBUNT Report | Page 1

SYBUNT Donors Based On Calendar Year Totals

ID	Giving Entity	Date	Last Gift	In-kind Gift	Type	Stimulus	Comments
2	Progressive Music, Inc.	02/23/2014	725.00		CA	Breakfast Special Eve	
3	Trek Foundation	01/31/2014	350.00		CK	2014 Annual Campaig	Example of soft credit donation
4	Gore, Martin L.	01/06/2014	560.00		VC	2014 Annual Campaig	
5	Mozart Memorial Account	09/28/2007	500.00		CA	Unsolicited	
6	1984 Productions	02/08/2014	400.00		CK	2014 Annual Campaig	
7	Schmidt Aeronautic Foundation	01/05/2017	600.00		CK	Unsolicited	
8	Scott, Montgomery	12/28/2010	1,000.00		CK	2010 Annual Campaig	
12	Hayward, Justin	03/26/2017	9,700.00		CA	2017 Annual Campaig	Any general comment can go here.
13	Lennon, John	09/25/2014	5,000.00		CA	2014 Annual Campaig	My forms prevail
15	Baker, Thomas	03/31/2017	750.00		CA	2017 Annual Campaig	
				20.00			
17	Foster, James	01/30/2017	450.00		CK	2017 Annual Campaig	
18	Bowie, Denise	03/31/2017	8,450.00		CK	2017 Annual Campaig	
20	Burke, James	12/31/2017	800.00		VC	2017 Annual Campaig	
21	Knight, Paula	01/23/2015	5,000.00		CK	Unsolicited	
				8.00			
23	Lodge, John	04/05/2015	700.00		CA	Unsolicited	
24	IBM Corporation	04/04/2013	12,345.67		CK	2013 Annual Campaig	
26	Smith, John	11/22/2014		8.00	HR	Volunteer Hours	Volunteered 8 hrs.
27	The Corporation For Public Broadcasti	03/31/2017	50,000.00		CK	2017 Annual Campaig	
28	Bach Memorial Account	04/15/2017	500.00		CA	2017 Annual Campaig	
29	Northern Songs Limited, (U.S. Division	10/01/2017	500.00		CK	Science Endowment	
10	Waters, Roger	03/31/2017	4,000.00		CK	2017 Annual Campaig	
			102,330.67				

Report Menu Name

Header - Telephone Report

Description

Designed to be used with a Header-based Selection Result, this report layout will show basic name and all contact phone numbers for each constituent.

02/26/2018 **Header - Telephone Report** **Page 1**

All Constituents

ID	Primary Name	Primary Telephones	Secondary Name	Secondary Telephones
32	Brad Anderson Intrepid Systems Inc.	H: (800) 555-1212 W: (800) 952-8228 M: F: (800) 533-9218	Samantha Anderson	H: W: M: F:
28	Johann Bach Bach Memorial Account	H: (206) 270-1050 W: M: F:		H: W: M: F:
15	Thomas Baker	H: (510) 356-7540 W: (123) 456-7890 X1234 M: F:		H: W: M: F:
18	Denise Bowie	H: (408) 555-1212 W: M: F:		H: W: M: F:
20	James Burke	H: (415) 555-1212 W: M: F:		H: W: M: F:
27	James Burke The Corporation For Public Broadc	H: ( ) - W: (415) 555-1234 M: F:		H: W: M: F:
11	Peter Davidson Decca Records	H: (415) 555-1212 W: M: F:		H: W: M: F:
17	James Foster	H: (510) 213-2132 W: M: F:		H: W: M: F:

Report Menu Name

Header - Telephone Report With Address

Description

Designed to be used with a Header-based Selection Result, this report layout will show basic name/address information for constituents, along with all contact phone numbers.

02/26/2018 | Header - Telephone Report With Address | Page 1

All Constituents

ID	Name/Address	Primary Telephones	Secondary Name	Secondary Telephones
32	Anderson, Brad Intrepid Systems Inc. 701 Galer St. Seattle, WA 98109	H: (800) 555-1212 W: (800) 952-8228 M: F: (800) 533-9218	Samantha Anderson	H: W: M: F:
28	Bach, Johann Bach Memorial Account 3543 Brandenburg Way Seattle, WA 98109	H: (206) 270-1050 W: M: F:		H: W: M: F:
15	Baker, Thomas 4968 Tardis Ave. San Jose, CA 95112-3211	H: (510) 356-7540 W: (123) 456-7890 X1234 M: F:		H: W: M: F:
18	Bowie, Denise 123 First Avenue Apt 200 San Jose, CA 95119-2312	H: (408) 555-1212 W: M: F:		H: W: M: F:
20	Burke, James 826 Connections Way Palo Alto, CA 94304-7899	H: (415) 555-1212 W: M: F:		H: W: M: F:
27	Burke, James The Corporation For Public Broadcastin 1105 Information Avenue San Francisco, CA 94175	H: ( ) - W: (415) 555-1234 M: F:		H: W: M: F:
11	Davidson, Peter Decca Records 3775 Galafrey Way Palo Alto, CA 94300-2112	H: (415) 555-1212 W: M: F:		H: W: M: F:
17	Foster, James 14552 Medical Dr. Saratoga, CA 95070-3212	H: (510) 213-2132 W: M: F:		H: W: M: F:

Report Menu Name

Header - Telephone Report With Address And First/Latest/Largest Donation

Description

Designed to be used with a Header-based Selection Result, this report layout will show basic name/address information for constituents, along with all contact phone numbers, first / latest / largest donation dates and amounts.

02/26/2018 Header - Telephone Report With Address And First/Latest/Largest Donation Page 1
All Constituents

ID	Name/Address	Primary Telephones	Secondary Name	Secondary Telephones	First/Latest/Largest	Amounts
32	Anderson, Brad Intrepid Systems Inc. 701 Galer St. Seattle, WA 98109	H: (800) 555-1212 W: (800) 952-8228 M: F: (800) 533-9218	Samantha Anderson	H: W: M: F:	01/25/1999 01/15/2018 11/15/2016	100.00 500.00 5,000.00
28	Bach, Johann Bach Memorial Account 3543 Brandenburg Way Seattle, WA 98109	H: (206) 270-1050 W: M: F:		H: W: M: F:	01/04/2013 04/15/2017 04/15/2017	500.00 500.00 500.00
15	Baker, Thomas 4968 Tardis Ave. San Jose, CA 95112-3211	H: (510) 356-7540 W: (123) 456-7890 X1234 M: F:		H: W: M: F:	01/25/2007 03/31/2017 02/19/2009	5,000.00 750.00 5,000.00
18	Bowie, Denise 123 First Avenue Apt 200 San Jose, CA 95119-2312	H: (408) 555-1212 W: M: F:		H: W: M: F:	03/23/2013 03/31/2017 03/31/2017	2,500.00 8,450.00 8,450.00
20	Burke, James 826 Connections Way Palo Alto, CA 94304-7899	H: (415) 555-1212 W: M: F:		H: W: M: F:	02/13/2012 12/31/2017 01/09/2013	4,000.00 800.00 4,520.00
27	Burke, James The Corporation For Public Broadcast 1105 Information Avenue San Francisco, CA 94175	H: ( ) - W: (415) 555-1234 M: F:		H: W: M: F:	03/01/2017 03/31/2017 03/31/2017	20,000.00 50,000.00 50,000.00
11	Davidson, Peter Decca Records 3775 Galafrey Way Palo Alto, CA 94300-2112	H: (415) 555-1212 W: M: F:		H: W: M: F:	09/06/2012 01/07/2018 09/01/2016	150.00 50.00 500.00
17	Foster, James 14552 Medical Dr. Saratoga, CA 95070-3212	H: (510) 213-2132 W: M: F:		H: W: M: F:	04/20/2011 01/30/2017 04/20/2011	500.00 450.00 500.00
4	Gore, Martin L. Stanford OPA Bldg. Eugene, OR 97401	H: (415) 555-1212 W: M: F:		H: W: M: F:	10/11/2012 01/06/2014 04/11/2013	175.00 560.00 1,025.00

Report Menu Name

Header - Top 10 Donor Report

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top ten monetary donors based on lifetime giving. If used with a Selection Result you create, it will alternatively show the top ten monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/26/2018 **Header - Top 10 Donor Report** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	344,000.00
2	12	Hayward, Justin	Individual	94,010.00
3	27	The Corporation For Public Broadcasting	Corporation	70,000.00
4	53	Musk, Elon	Individual	48,000.00
5	32	Intrepid Systems Inc.	Corporation	33,100.00
6	20	Burke, James	Individual	24,014.00
7	15	Baker, Thomas	Individual	21,550.00
8	18	Bowie, Denise	Individual	20,950.00
9	10	Waters, Roger	Individual	20,250.00
10	13	Lennon, John	Individual	17,000.00
				692,874.00

Report Menu Name

Header - Top 10 Donor Report For Current Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top ten monetary donors for the current calendar year. If used with a Selection Result you create, it will alternatively show the top ten monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/08/2018 **Header - Top 10 Donor Report For Current Calendar Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 2018
1	32	Intrepid Systems Inc.	Church	500.00
2	11	Decca Records	Corporation	50.00
				550.00

Report Menu Name

Header - Top 10 Donor Report For Current Fiscal Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top ten monetary donors for the current fiscal year. If used with a Selection Result you create, it will alternatively show the top ten monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/08/2018 **Header - Top 10 Donor Report For Current Fiscal Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total For Fiscal 2018
1	53	Musk, Elon	Individual	10,000.00
2	1	Burke, James	Individual	800.00
3	32	Intrepid Systems Inc.	Church	500.00
4	11	Decca Records	Corporation	50.00
				11,350.00

Report Menu Name

Header - Top 10 Donor Report For Previous Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top ten monetary donors for the previous calendar year. If used with a Selection Result you create, it will alternatively show the top ten monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/08/2018 — **Header - Top 10 Donor Report For Previous Calendar Year** — Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 2017
1	27	The Corporation For Public Broadcasting	Corporation	50,000.00
2	53	Musk, Elon	Individual	17,000.00
3	12	Hayward, Justin	Individual	9,700.00
4	18	Bowie, Denise	Individual	8,450.00
5	10	Waters, Roger	Individual	4,000.00
6	32	Intrepid Systems Inc.	Church	1,200.00
7	1	Burke, James	Individual	800.00
8	15	Baker, Thomas	Individual	750.00
9	7	Schmidt Aeronautic Foundation	Foundation	600.00
10	28	Bach Memorial Account	Memorial Record	500.00
				93,000.00

Report Menu Name

Header - Top 10 Donor Report For Previous Fiscal Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top ten monetary donors for the previous fiscal year. If used with a Selection Result you create, it will alternatively show the top ten monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/08/2018 **Header - Top 10 Donor Report For Previous Fiscal Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total For Fiscal 2017
1	29	Northern Songs Limited, (U.S. Division)	Corporation	108,000.00
2	27	The Corporation For Public Broadcasting	Corporation	50,000.00
3	12	Hayward, Justin	Individual	17,700.00
4	53	Musk, Elon	Individual	13,500.00
5	18	Bowie, Denise	Individual	8,450.00
6	32	Intrepid Systems Inc.	Church	6,200.00
7	10	Waters, Roger	Individual	4,000.00
8	15	Baker, Thomas	Individual	750.00
9	7	Schmidt Aeronautic Foundation	Foundation	600.00
10	28	Bach Memorial Account	Memorial Record	500.00
				209,700.00

Report Menu Name

Header - Top 100 Donor Report

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on lifetime giving. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/08/2018 | Header - Top 100 Donor Report | Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Lifetime Donation Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	343,500.00
2	12	Hayward, Justin	Individual	94,010.00
3	27	The Corporation For Public Broadcasting	Corporation	50,000.00
4	53	Musk, Elon	Individual	39,000.00
5	32	Intrepid Systems Inc.	Church	33,100.00
6	15	Baker, Thomas	Individual	21,550.00
7	18	Bowie, Denise	Individual	20,950.00
8	10	Waters, Roger	Individual	20,250.00
9	13	Lennon, John	Individual	17,000.00
10	1	Burke, James	Individual	15,100.00
11	24	IBM Corporation	Corporation	14,814.23
12	23	Lodge, John	Individual	13,500.00
13	21	Knight, Paula	Individual	11,800.00
14	3	Trek Foundation	Foundation	11,200.00
15	20	Burke, James	Individual	8,914.00
16	7	Schmidt Aeronautic Foundation	Foundation	6,700.00
17	2	Progressive Music, Inc.	Organization	2,896.00
18	4	Gore, Martin L.	Individual	2,160.00
19	6	1984 Productions	Corporation	2,000.00
20	17	Foster, James	Individual	1,625.00
21	28	Bach Memorial Account	Memorial Record	1,250.00
22	8	Scott, Montgomery	Individual	1,000.00
23	11	Decca Records	Corporation	850.00
24	5	Mozart Memorial Account	Memorial Record	500.00
25	26	Smith, John	Individual	200.00
				733,869.23

Report Menu Name

Header - Top 100 Donor Report For 2015

Description

This report layout exists as an example of how to build a year-specific top 100 report. To create your own, first copy this report layout to a new name, then click the Setup button on the DonorQuest Report Menu. On the Options tab of the report setup, change 2015 in the report title to be the calendar year you want. Also change it in the Initializations line.

02/09/2018 **Header - Top 100 Donor Report For 2015** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 2015
1	29	Northern Songs Limited, (U.S. Division)	Corporation	70,000.00
2	53	Musk, Elon	Individual	9,500.00
3	12	Hayward, Justin	Individual	7,500.00
4	23	Lodge, John	Individual	5,700.00
5	18	Bowie, Denise	Individual	5,500.00
6	21	Knight, Paula	Individual	5,000.00
7	15	Baker, Thomas	Individual	2,000.00
8	32	Intrepid Systems Inc.	Church	2,000.00
				107,200.00

Report Menu Name

Header - Top 100 Donor Report For 2015 to Present

Description

This report layout exists as an example of how to build a year-to-present top 100 report. To create your own, first copy this report layout to a new name, then click the Setup button on the DonorQuest Report Menu. On the Options tab of the report setup, change 2015 in the report title to be the calendar year you want. Also change it in the Initializations line.

02/09/2018 **Header - Top 100 Donor Report For 2015 to Present** Page 1

All Constituents

Rank	ID	Giving Entity	City	Telephone	Total 2015-Present
1	29	Northern Songs Limited, (U.S. Division)	San Francisco		178,000.00
2	27	The Corporation For Public Broadcasting	San Francisco	( ) -	50,000.00
3	53	Musk, Elon	Fremont		39,000.00
4	12	Hayward, Justin	Seattle	(425) 555-1212	25,200.00
5	18	Bowie, Denise	San Jose	(408) 555-1212	13,950.00
6	32	Intrepid Systems Inc.	Seattle	(800) 555-1212	8,700.00
7	23	Lodge, John	Yuba City	(510) 159-2654	5,700.00
8	15	Baker, Thomas	San Jose	(510) 356-7540	5,350.00
9	21	Knight, Paula	San Jose	(510) 555-1212	5,000.00
10	10	Waters, Roger	San Mateo	(808) 555-1212	4,000.00
11	1	Burke, James	Palo Alto	(510) 328-2028	1,300.00
12	7	Schmidt Aeronautic Foundation	Saratoga		600.00
13	28	Bach Memorial Account	Seattle	(206) 270-1050	500.00
14	17	Foster, James	Saratoga	(510) 213-2132	450.00
15	11	Decca Records	Palo Alto	(415) 555-1212	50.00
					337,800.00

Report Menu Name

Header - Top 100 Donor Report For Current And Past One Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving from the beginning of the previous calendar year to the current day. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current And Past One Calendar Year** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	2018	2017	2 Year Total
1	27	The Corporation For Public Broad	Corporation	0.00	50,000.00	50,000.00
2	53	Musk, Elon	Individual	0.00	17,000.00	17,000.00
3	12	Hayward, Justin	Individual	0.00	9,700.00	9,700.00
4	18	Bowie, Denise	Individual	0.00	8,450.00	8,450.00
5	10	Waters, Roger	Individual	0.00	4,000.00	4,000.00
6	32	Intrepid Systems Inc.	Church	500.00	1,200.00	1,700.00
7	1	Burke, James	Individual	0.00	800.00	800.00
8	15	Baker, Thomas	Individual	0.00	750.00	750.00
9	7	Schmidt Aeronautic Foundation	Foundation	0.00	600.00	600.00
10	28	Bach Memorial Account	Memorial Record	0.00	500.00	500.00
11	17	Foster, James	Individual	0.00	450.00	450.00
12	11	Decca Records	Corporation	50.00	0.00	50.00
				550.00	93,450.00	94,000.00

Report Menu Name

Header - Top 100 Donor Report For Current And Past One Fiscal Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving from the beginning of the previous fiscal year to the current day. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current And Past One Fiscal Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Fiscal 2018	Fiscal 2017	2 Year Total
1	29	Northern Songs Limited, (U.S. Divi	Corporation	0.00	108,000.00	108,000.00
2	27	The Corporation For Public Broad	Corporation	0.00	50,000.00	50,000.00
3	53	Musk, Elon	Individual	10,000.00	13,500.00	23,500.00
4	12	Hayward, Justin	Individual	0.00	17,700.00	17,700.00
5	18	Bowie, Denise	Individual	0.00	8,450.00	8,450.00
6	32	Intrepid Systems Inc.	Church	500.00	6,200.00	6,700.00
7	10	Waters, Roger	Individual	0.00	4,000.00	4,000.00
8	1	Burke, James	Individual	800.00	0.00	800.00
9	15	Baker, Thomas	Individual	0.00	750.00	750.00
10	7	Schmidt Aeronautic Foundation	Foundation	0.00	600.00	600.00
11	28	Bach Memorial Account	Memorial Record	0.00	500.00	500.00
12	17	Foster, James	Individual	0.00	450.00	450.00
13	11	Decca Records	Corporation	50.00	0.00	50.00
				11,350.00	210,150.00	221,500.00

Report Menu Name

Header - Top 100 Donor Report For Current And Past Three Calendar Years

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the current and past three calendar years. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current And Past Three Calendar Years** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	2018	2017	2016	2015	4 Year Total
1	29	Northern Songs Limited, (U.S. Di	Corporation	0.00	0.00	108,000.00	70,000.00	178,000.00
2	27	The Corporation For Public Broa	Corporation	0.00	50,000.00	0.00	0.00	50,000.00
3	53	Musk, Elon	Individual	0.00	17,000.00	12,500.00	9,500.00	39,000.00
4	12	Hayward, Justin	Individual	0.00	9,700.00	8,000.00	7,500.00	25,200.00
5	18	Bowie, Denise	Individual	0.00	8,450.00	0.00	5,500.00	13,950.00
6	32	Intrepid Systems Inc.	Church	500.00	1,200.00	5,000.00	2,000.00	8,700.00
7	23	Lodge, John	Individual	0.00	0.00	0.00	5,700.00	5,700.00
8	15	Baker, Thomas	Individual	0.00	750.00	2,600.00	2,000.00	5,350.00
9	21	Knight, Paula	Individual	0.00	0.00	0.00	5,000.00	5,000.00
10	10	Waters, Roger	Individual	0.00	4,000.00	0.00	0.00	4,000.00
11	1	Burke, James	Individual	0.00	800.00	500.00	0.00	1,300.00
12	7	Schmidt Aeronautic Foundation	Foundation	0.00	600.00	0.00	0.00	600.00
13	28	Bach Memorial Account	Memorial Record	0.00	500.00	0.00	0.00	500.00
14	17	Foster, James	Individual	0.00	450.00	0.00	0.00	450.00
15	11	Decca Records	Corporation	50.00	0.00	0.00	0.00	50.00
				550.00	93,450.00	136,600.00	107,200.00	337,800.00

Report Menu Name

Header - Top 100 Donor Report For Current And Past Three Fiscal Years

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the current and past three fiscal years. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current And Past Three Fiscal Years** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Fiscal 2018	Fiscal 2017	Fiscal 2016	Fiscal 2015	4 Year Total
1	29	Northern Songs Limited, (U.S. Di	Corporation	0.00	108,000.00	70,000.00	50,000.00	228,000.00
2	27	The Corporation For Public Broa	Corporation	0.00	50,000.00	0.00	0.00	50,000.00
3	53	Musk, Elon	Individual	10,000.00	13,500.00	11,000.00	4,500.00	39,000.00
4	12	Hayward, Justin	Individual	0.00	17,700.00	7,500.00	6,500.00	31,700.00
5	10	Waters, Roger	Individual	0.00	4,000.00	0.00	10,000.00	14,000.00
6	18	Bowie, Denise	Individual	0.00	8,450.00	0.00	5,500.00	13,950.00
7	23	Lodge, John	Individual	0.00	0.00	0.00	13,200.00	13,200.00
8	32	Intrepid Systems Inc.	Church	500.00	6,200.00	2,000.00	0.00	8,700.00
9	15	Baker, Thomas	Individual	0.00	750.00	3,100.00	1,600.00	5,450.00
10	13	Lennon, John	Individual	0.00	0.00	0.00	5,000.00	5,000.00
11	21	Knight, Paula	Individual	0.00	0.00	0.00	5,000.00	5,000.00
12	1	Burke, James	Individual	800.00	0.00	500.00	0.00	1,300.00
13	7	Schmidt Aeronautic Foundation	Foundation	0.00	600.00	0.00	0.00	600.00
14	28	Bach Memorial Account	Memorial Record	0.00	500.00	0.00	0.00	500.00
15	17	Foster, James	Individual	0.00	450.00	0.00	0.00	450.00
16	11	Decca Records	Corporation	50.00	0.00	0.00	0.00	50.00
				11,350.00	210,150.00	94,100.00	101,300.00	416,900.00

Report Menu Name

Header - Top 100 Donor Report For Current And Past Two Calendar Years

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the current and past two calendar years. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current And Past Two Calendar Years** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Calendar 2018	Calendar 2017	Calendar 2016	3 Year Total
1	29	Northern Songs Limited, (U.S. Divisi	Corporation	0.00	0.00	108,000.00	108,000.00
2	27	The Corporation For Public Broadca	Corporation	0.00	50,000.00	0.00	50,000.00
3	53	Musk, Elon	Individual	0.00	17,000.00	12,500.00	29,500.00
4	12	Hayward, Justin	Individual	0.00	9,700.00	8,000.00	17,700.00
5	18	Bowie, Denise	Individual	0.00	8,450.00	0.00	8,450.00
6	32	Intrepid Systems Inc.	Church	500.00	1,200.00	5,000.00	6,700.00
7	10	Waters, Roger	Individual	0.00	4,000.00	0.00	4,000.00
8	15	Baker, Thomas	Individual	0.00	750.00	2,600.00	3,350.00
9	1	Burke, James	Individual	0.00	800.00	500.00	1,300.00
10	7	Schmidt Aeronautic Foundation	Foundation	0.00	600.00	0.00	600.00
11	28	Bach Memorial Account	Memorial Record	0.00	500.00	0.00	500.00
12	17	Foster, James	Individual	0.00	450.00	0.00	450.00
13	11	Decca Records	Corporation	50.00	0.00	0.00	50.00
				550.00	93,450.00	136,600.00	230,600.00

Report Menu Name

Header - Top 100 Donor Report For Current And Past Two Fiscal Years

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the current and past two fiscal years. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current And Past Two Fiscal Years** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Fiscal 2018	Fiscal 2017	Fiscal 2016	3 Year Total
1	29	Northern Songs Limited, (U.	Corporation	0.00	108,000.00	70,000.00	178,000.00
2	27	The Corporation For Public	Corporation	0.00	50,000.00	0.00	50,000.00
3	53	Musk, Elon	Individual	10,000.00	13,500.00	11,000.00	34,500.00
4	12	Hayward, Justin	Individual	0.00	17,700.00	7,500.00	25,200.00
5	32	Intrepid Systems Inc.	Church	500.00	6,200.00	2,000.00	8,700.00
6	18	Bowie, Denise	Individual	0.00	8,450.00	0.00	8,450.00
7	10	Waters, Roger	Individual	0.00	4,000.00	0.00	4,000.00
8	15	Baker, Thomas	Individual	0.00	750.00	3,100.00	3,850.00
9	1	Burke, James	Individual	800.00	0.00	500.00	1,300.00
10	7	Schmidt Aeronautic Founda	Foundation	0.00	600.00	0.00	600.00
11	28	Bach Memorial Account	Memorial Record	0.00	500.00	0.00	500.00
12	17	Foster, James	Individual	0.00	450.00	0.00	450.00
13	11	Decca Records	Corporation	50.00	0.00	0.00	50.00
				11,350.00	210,150.00	94,100.00	315,600.00

Report Menu Name

Header - Top 100 Donor Report For Current Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the current calendar year. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current Calendar Year** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 2018
1	53	Musk, Elon	Individual	5,000.00
2	32	Intrepid Systems Inc.	Corporation	500.00
3	11	Decca Records	Corporation	50.00
				5,550.00

Report Menu Name

Header - Top 100 Donor Report For Current Fiscal Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the current fiscal year. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Current Fiscal Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total For Fiscal 2018
1	53	Musk, Elon	Individual	15,000.00
2	1	Burke, James	Individual	800.00
3	32	Intrepid Systems Inc.	Corporation	500.00
4	11	Decca Records	Corporation	50.00
				16,350.00

Report Menu Name

Header - Top 100 Donor Report For November And December Of Last Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for just the months of November and December of the previous calendar year. These months are of particular interest since they represent holiday giving which is normally the time when there is a lot of giving. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For November And December Of Last Calendar Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Nov-Dec Total
1	53	Musk, Elon	Individual	10,000.00
2	1	Burke, James	Individual	800.00
3	6	1984 Productions	Corporation	0.00
4	28	Bach Memorial Account	Memorial Record	0.00
5	15	Baker, Thomas	Individual	0.00
6	18	Bowie, Denise	Individual	0.00
7	20	Burke, James	Individual	0.00
8	11	Decca Records	Corporation	0.00
9	17	Foster, James	Individual	0.00
10	4	Gore, Martin L.	Individual	0.00
11	12	Hayward, Justin	Individual	0.00
12	24	IBM Corporation	Corporation	0.00
13	32	Intrepid Systems Inc.	Corporation	0.00
14	21	Knight, Paula	Individual	0.00
15	19	Koneig, John	Organization	0.00
16	13	Lennon, John	Individual	0.00
17	23	Lodge, John	Individual	0.00
18	5	Mozart Memorial Account	Memorial Record	0.00
19	29	Northern Songs Limited, (U.S. Division)	Corporation	0.00
20	2	Progressive Music, Inc.	Organization	0.00
21	7	Schmidt Aeronautic Foundation	Foundation	0.00
22	8	Scott, Montgomery	Individual	0.00
23	26	Smith, John	Individual	0.00
24	27	The Corporation For Public Broadcasting	Corporation	0.00
25	3	Trek Foundation	Foundation	0.00
26	10	Waters, Roger	Individual	0.00
				10,800.00

Report Menu Name

Header - Top 100 Donor Report For Previous Calendar Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the previous calendar year. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Previous Calendar Year** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 2017
1	27	The Corporation For Public Broadcasting	Corporation	50,000.00
2	53	Musk, Elon	Individual	17,000.00
3	12	Hayward, Justin	Individual	9,700.00
4	18	Bowie, Denise	Individual	8,450.00
5	10	Waters, Roger	Individual	4,000.00
6	32	Intrepid Systems Inc.	Corporation	1,200.00
7	1	Burke, James	Individual	800.00
8	15	Baker, Thomas	Individual	750.00
9	7	Schmidt Aeronautic Foundation	Foundation	600.00
10	28	Bach Memorial Account	Memorial Record	500.00
11	17	Foster, James	Individual	450.00
				93,450.00

Report Menu Name

Header - Top 100 Donor Report For Previous Fiscal Year

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 100 monetary donors based on total giving for the previous fiscal year. If used with a Selection Result you create, it will alternatively show the top 100 monetary donors with giving in the period who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 100 Donor Report For Previous Fiscal Year** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Total For Fiscal 2017
1	29	Northern Songs Limited, (U.S. Division)	Corporation	108,000.00
2	27	The Corporation For Public Broadcasting	Corporation	50,000.00
3	12	Hayward, Justin	Individual	17,700.00
4	53	Musk, Elon	Individual	13,500.00
5	18	Bowie, Denise	Individual	8,450.00
6	32	Intrepid Systems Inc.	Corporation	6,200.00
7	10	Waters, Roger	Individual	4,000.00
8	15	Baker, Thomas	Individual	750.00
9	7	Schmidt Aeronautic Foundation	Foundation	600.00
10	28	Bach Memorial Account	Memorial Record	500.00
11	17	Foster, James	Individual	450.00
				210,150.00

Report Menu Name

Header - Top 1000 Donor Report

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 1000 monetary donors based on lifetime giving. If used with a Selection Result you create, it will alternatively show the top 1000 monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 1000 Donor Report** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Lifetime Donation Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	343,500.00
2	12	Hayward, Justin	Individual	94,010.00
3	27	The Corporation For Public Broadcasting	Corporation	50,000.00
4	53	Musk, Elon	Individual	44,000.00
5	32	Intrepid Systems Inc.	Corporation	33,100.00
6	15	Baker, Thomas	Individual	21,550.00
7	18	Bowie, Denise	Individual	20,950.00
8	10	Waters, Roger	Individual	20,250.00
9	13	Lennon, John	Individual	17,000.00
10	1	Burke, James	Individual	15,100.00
11	24	IBM Corporation	Corporation	14,814.23
12	23	Lodge, John	Individual	13,500.00
13	21	Knight, Paula	Individual	11,800.00
14	3	Trek Foundation	Foundation	11,200.00
15	20	Burke, James	Individual	8,914.00
16	7	Schmidt Aeronautic Foundation	Foundation	6,700.00
17	2	Progressive Music, Inc.	Organization	2,896.00
18	4	Gore, Martin L.	Individual	2,160.00
19	6	1984 Productions	Corporation	2,000.00
20	17	Foster, James	Individual	1,625.00
21	28	Bach Memorial Account	Memorial Record	1,250.00
22	8	Scott, Montgomery	Individual	1,000.00
23	11	Decca Records	Corporation	850.00
24	5	Mozart Memorial Account	Memorial Record	500.00
25	26	Smith, John	Individual	200.00
				738,869.23

Report Menu Name

Header - Top 200 Donor Report For Past 12 Months

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 200 monetary donors for the past 12 month period. This is not based on a calendar or fiscal year at all, but is simply a 365-day period extended from the day you run the report going back 365 days. If used with a Selection Result you create, it will alternatively show the top 200 monetary donors who are in the Selection Result only for the period. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 200 Donor Report For Past 12 Months** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 02/09/2017 To 02/09/2018
1	27	The Corporation For Public Broadcasting	Corporation	50,000.00
2	53	Musk, Elon	Individual	22,000.00
3	12	Hayward, Justin	Individual	9,700.00
4	18	Bowie, Denise	Individual	8,450.00
5	10	Waters, Roger	Individual	4,000.00
6	32	Intrepid Systems Inc.	Corporation	1,700.00
7	1	Burke, James	Individual	800.00
8	15	Baker, Thomas	Individual	750.00
9	28	Bach Memorial Account	Memorial Record	500.00
10	11	Decca Records	Corporation	50.00
				97,950.00

Report Menu Name

Header - Top 200 Donor Report For Past 18 Months

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 200 monetary donors for the past 18 month period. This is simply a 548-day period extended from the day you run the report going back 548 days. If used with a Selection Result you create, it will alternatively show the top 200 monetary donors who are in the Selection Result only for the period. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 200 Donor Report For Past 18 Months** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 08/10/2016 To 02/09/2018
1	29	Northern Songs Limited, (U.S. Division)	Corporation	108,000.00
2	27	The Corporation For Public Broadcasting	Corporation	50,000.00
3	53	Musk, Elon	Individual	28,500.00
4	12	Hayward, Justin	Individual	17,700.00
5	18	Bowie, Denise	Individual	8,450.00
6	32	Intrepid Systems Inc.	Corporation	6,700.00
7	10	Waters, Roger	Individual	4,000.00
8	1	Burke, James	Individual	800.00
9	15	Baker, Thomas	Individual	750.00
10	7	Schmidt Aeronautic Foundation	Foundation	600.00
11	28	Bach Memorial Account	Memorial Record	500.00
12	17	Foster, James	Individual	450.00
13	11	Decca Records	Corporation	50.00
				226,500.00

Report Menu Name

Header - Top 2000 Donor Report For Past 18 Months

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 2000 monetary donors for the past 18 month period. This is simply a 548-day period extended from the day you run the report going back 548 days. If used with a Selection Result you create, it will alternatively show the top 2000 monetary donors who are in the Selection Result only for the period. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 2000 Donor Report For Past 18 Months** **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 08/10/2016 To 02/09/2018
1	29	Northern Songs Limited, (U.S. Division)	Corporation	108,000.00
2	27	The Corporation For Public Broadcasting	Corporation	50,000.00
3	53	Musk, Elon	Individual	28,500.00
4	12	Hayward, Justin	Individual	17,700.00
5	18	Bowie, Denise	Individual	8,450.00
6	32	Intrepid Systems Inc.	Corporation	6,700.00
7	10	Waters, Roger	Individual	4,000.00
8	1	Burke, James	Individual	800.00
9	15	Baker, Thomas	Individual	750.00
10	7	Schmidt Aeronautic Foundation	Foundation	600.00
11	28	Bach Memorial Account	Memorial Record	500.00
12	17	Foster, James	Individual	450.00
13	11	Decca Records	Corporation	50.00
				226,500.00

Report Menu Name

Header - Top 300 Donor Report For Past 60 Months

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 300 monetary donors for the past 60 month period. This is simply an 1,825-day period extended from the day you run the report going back 1,825 days. If used with a Selection Result you create, it will alternatively show the top 300 monetary donors who are in the Selection Result only for the period. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 — **Header - Top 300 Donor Report For Past 60 Months** — **Page 1**

All Constituents

Rank	ID	Giving Entity	Donor Type	Donation Total 02/10/2013 To 02/09/2018
1	29	Northern Songs Limited, (U.S. Division)	Corporation	228,000.00
2	27	The Corporation For Public Broadcasting	Corporation	50,000.00
3	53	Musk, Elon	Individual	44,000.00
4	12	Hayward, Justin	Individual	37,700.00
5	18	Bowie, Denise	Individual	20,950.00
6	10	Waters, Roger	Individual	18,000.00
7	13	Lennon, John	Individual	17,000.00
8	24	IBM Corporation	Corporation	13,579.67
9	23	Lodge, John	Individual	13,200.00
10	32	Intrepid Systems Inc.	Corporation	11,100.00
11	1	Burke, James	Individual	10,300.00
12	21	Knight, Paula	Individual	7,600.00
13	15	Baker, Thomas	Individual	6,450.00
14	7	Schmidt Aeronautic Foundation	Foundation	5,200.00
15	20	Burke, James	Individual	3,544.00
16	3	Trek Foundation	Foundation	3,350.00
17	4	Gore, Martin L.	Individual	1,885.00
18	2	Progressive Music, Inc.	Organization	1,609.00
19	6	1984 Productions	Corporation	1,300.00
20	17	Foster, James	Individual	1,025.00
21	28	Bach Memorial Account	Memorial Record	500.00
22	11	Decca Records	Corporation	250.00
				496,542.67

Report Menu Name

Header - Top 5000 Donor Report

Description

Designed to be run directly, or used with a Header-based Selection Result, this report layout will show the top 5000 monetary donors based on lifetime giving. If used with a Selection Result you create, it will alternatively show the top 5000 monetary donors who are in the Selection Result only. Constituents are ranked from highest giving to lowest. The type of each constituent is also shown.

02/09/2018 **Header - Top 5000 Donor Report** Page 1

All Constituents

Rank	ID	Giving Entity	Donor Type	Lifetime Donation Total
1	29	Northern Songs Limited, (U.S. Division)	Corporation	343,500.00
2	12	Hayward, Justin	Individual	94,010.00
3	27	The Corporation For Public Broadcasting	Corporation	50,000.00
4	53	Musk, Elon	Individual	44,000.00
5	32	Intrepid Systems Inc.	Corporation	33,100.00
6	15	Baker, Thomas	Individual	21,550.00
7	18	Bowie, Denise	Individual	20,950.00
8	10	Waters, Roger	Individual	20,250.00
9	13	Lennon, John	Individual	17,000.00
10	1	Burke, James	Individual	15,100.00
11	24	IBM Corporation	Corporation	14,814.23
12	23	Lodge, John	Individual	13,500.00
13	21	Knight, Paula	Individual	11,800.00
14	3	Trek Foundation	Foundation	11,200.00
15	20	Burke, James	Individual	8,914.00
16	7	Schmidt Aeronautic Foundation	Foundation	6,700.00
17	2	Progressive Music, Inc.	Organization	2,896.00
18	4	Gore, Martin L.	Individual	2,160.00
19	6	1984 Productions	Corporation	2,000.00
20	17	Foster, James	Individual	1,625.00
21	28	Bach Memorial Account	Memorial Record	1,250.00
22	8	Scott, Montgomery	Individual	1,000.00
23	11	Decca Records	Corporation	850.00
24	5	Mozart Memorial Account	Memorial Record	500.00
25	26	Smith, John	Individual	200.00
				738,869.23

Report Menu Name

Header - Volunteer Hours - First & Last - Ordered by Last

Description

Designed to be used with a Header-based Selection Result, this report layout will show each constituent's name, phone, and the number of hours they worked on their first day of volunteering, and their most recent day of work.

02/09/2018 | Header - Volunteer Hours - First & Last - Ordered by Last | Page 1

All Constituents

Last Name	First Name	Phone	First Gift Date	First Gift Hours	Last Gift Date	Last Gift Hours
Baker	Thomas	(510) 356-7540	10/20/2011	20.00	10/20/2011	20.00
Knight	Paula	(510) 555-1212	10/06/2013	8.00	10/06/2013	8.00
Smith	John	(510) 364-3773	11/22/2014	8.00	11/22/2014	8.00
				36.00		36.00

Report Menu Name

Header - Zip Code Counts

Description

Designed to be used with a Header-based Selection Result, this report layout will count the number of constituents in each zip code.

02/09/2018 **Header - Zip Code Counts** **Page 1**
All Constituents

Zip	State	Count
12345	NY	1
92104	CA	1
94161	CA	2
94175	CA	1
94300	CA	1
94304	CA	2
94403	CA	2
94538	CA	1
95070	CA	3
95112	CA	1
95119	CA	1
95131	CA	1
95133	CA	1
95135	CA	1
95991	CA	1
96067	CA	1
97401	OR	1
98109	WA	4
		26

Report Menu Name

Header - Zip Code Counts With Lifetime Donation Totals

Description

Designed to be used with a Header-based Selection Result, this report layout will count the number of constituents in each zip code. It will also show total lifetime donations from each zip code, and display the city and state associated with each zip code. This report is also helpful when doing bulk mailing as it allows you to know how many 5-digit bundles you may form before dropping down to 3-digit bundles.

02/09/2018 **Header - Zip Code Counts With Lifetime Donation Totals** **Page 1**

All Constituents

Zip	City	State	Count	Lifetime Total
12345	Schenectady	NY	1	1,000.00
92104	Salzburg	CA	1	500.00
94161	San Francisco	CA	2	360,500.00
94175	San Francisco	CA	1	50,000.00
94300	Palo Alto	CA	1	850.00
94304	Palo Alto	CA	2	24,014.00
94403	San Mateo	CA	2	20,450.00
94538	Fremont	CA	1	44,000.00
95070	Saratoga	CA	3	10,325.00
95112	San Jose	CA	1	21,550.00
95119	San Jose	CA	1	20,950.00
95131	San Jose	CA	1	14,814.23
95133	San Jose	CA	1	11,800.00
95135	San Jose	CA	1	0.00
95991	Yuba City	CA	1	13,500.00
96067	Mount Shasta	CA	1	11,200.00
97401	Eugene	OR	1	2,160.00
98109	Seattle	WA	4	131,256.00
			26	738,869.23

Report Menu Name

Header - Zip Code Counts, Considering First 3 Digits Of Zip Code Only

Description

Designed to be used with a Header-based Selection Result, this report layout will count the number of constituents who have a zip code beginning with the same three digits. This report is useful when doing mass mailings as it allows for postal discounts if you sort your outbound mailing into bins by the first three digits of the destination zip code. For very large mailings, you would first group your mail pieces into bins by 5-digit zip code.

02/09/2018 Header - Zip Code Counts, Considering First 3 Digits Of Zip Code Only Page 1

All Constituents

3-Digits Of Zip	State	Count
123	NY	1
921	CA	1
941	CA	3
943	CA	3
944	CA	2
945	CA	1
950	CA	3
951	CA	5
959	CA	1
960	CA	1
974	OR	1
981	WA	4
		26

Report Menu Name

Pledge Statements: All Outstanding Pledges

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will print pledge statements for all donors who have any outstanding pledges which have not been written off. While most pledge statements are limited to showing outstanding pledges of specific payment frequencies (monthly, quarterly, semester, yearly), this pledge statement will show all outstanding pledges, regardless of payment frequency. This report is normally run directly so that it may in turn run its own selection to find just the donors with any outstanding pledges. However, if you wish control over which donors receive statements, you may run your own selection to use with this report. You can also use this report to print statements on demand for donors, directly from the DonorQuest Main Information window. To do this, simply lookup the donor as you would to add a payment for them, then with their record highlighted, click on the Printer icon on the DonorQuest tool bar. Confirm the donor's name, then choose this report layout from the report menu.

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 05/29/2018

Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

PLEDGE INFORMATION

DATE	REFERENCE	DESCRIPTION	AMOUNT	CREDIT	BALANCE
02/01/2018	Apple Mac Fleet Upgrad	Funding Migration from Windows	50,000.00	0.00	50,000.00
02/01/2018	Car Fleet Electrification	Funding Electric Vehicles	6,000.00	0.00	6,000.00
02/01/2018	Automation Projects	Automating our warehouse	24,000.00	0.00	24,000.00
02/01/2018	Music Education	Support for music education	6,000.00	0.00	6,000.00
10/01/2017	Science Endowment	Support for science education	12,000.00	4,000.00	8,000.00

Total of Expected Payments for all Outstanding Pledges:	49,500.00
Total of Actual Payments made on all Outstanding Pledges:	4,000.00
Please Pay This Amount:	45,500.00

YOUR PAYMENTS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Pledge Statements: All Outstanding Pledges With ALL Payment History

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will print pledge statements for all donors who have any outstanding pledges which have not been written off. While most pledge statements are limited to showing outstanding pledges of specific payment frequencies (monthly, quarterly, semester, yearly), this pledge statement will show all outstanding pledges, regardless of payment frequency. In addition to showing outstanding pledges, this statement will also show all payments to date, including those applied to pledges which have been paid off. Showing all payments, even to pledges which have been paid off, show the totality of the donor's pledge payment history in case there is any doubt as to how payments were applied. This report is normally run directly so that it may run its own selection to find just the donors with any outstanding pledges. However, if you wish control over which donors receive statements, you may run your own selection to use with this report. You can also use this report to print statements on demand for donors, directly from the DonorQuest Main Information window. To do this, simply lookup the donor as you would to add a payment for them, then with their record highlighted, click on the Printer icon on the DonorQuest tool bar. Confirm the donor's name, then choose this report layout from the report menu.

ABC Nonprofit Organization
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Seattle, WA 98109
(206) 270-1050

Statement Date: 05/29/2018

Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

PLEDGE INFORMATION

PLEDGE ID	DATE	REFERENCE	DESCRIPTION	AMOUNT	CREDIT	BALANCE
5	02/01/2018	Apple Mac Fleet Upg	Funding Migration from Windows	$50,000.00	$0.00	$50,000.00
4	02/01/2018	Car Fleet Electrificati	Funding Electric Vehicles	$6,000.00	$0.00	$6,000.00
3	02/01/2018	Automation Projects	Automating our warehouse	$24,000.00	$0.00	$24,000.00
2	02/01/2018	Music Education	Support for music education	$6,000.00	$0.00	$6,000.00
1	10/01/2017	Science Endowment	Support for science education	$12,000.00	$4,000.00	$8,000.00

PAYMENT INFORMATION

PLEDGE ID	DATE	AMOUNT	CHECK NUMBER	RECEIPT NUMBER
1	01/15/2018	$1,000.00	1125	23599
1	12/15/2017	$1,000.00	1124	23598
1	11/15/2017	$1,000.00	1123	23597
1	10/15/2017	$1,000.00	1122	23596

Total of Expected Payments for all Outstanding Pledges:	$49,500.00
Total of Actual Payments made on all Outstanding Pledges:	$4,000.00
Please Pay This Amount:	$45,500.00

YOUR PAYMENTS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Pledge Statements: All Outstanding Pledges With Payment History

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will print pledge statements for all donors who have any outstanding pledges which have not been written off. While most pledge statements are limited to showing outstanding pledges of specific payment frequencies (monthly, quarterly, semester, yearly), this pledge statement will show all outstanding pledges, regardless of payment frequency. In addition to showing outstanding pledges, this statement will also show all payments to date applied to the outstanding pledges. This report is normally run directly so that it may run its own selection to find just the donors with any outstanding pledges. However, if you wish control over which donors receive statements, you may run your own selection to use with this report. You can also use this report to print statements on demand for donors, directly from the DonorQuest Main Information window. To do this, simply lookup the donor as you would to add a payment for them, then with their record highlighted, click on the Printer icon on the DonorQuest tool bar. Confirm the donor's name, then choose this report layout from the report menu.

ABC Nonprofit Organization
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Statement Date: 05/29/2018

Elon Musk
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Identification No.: 53

PLEDGE INFORMATION

PLEDGE ID	DATE	REFERENCE	DESCRIPTION	AMOUNT	CREDIT	BALANCE
5	02/01/2018	Apple Mac Fleet Upg	Funding Migration from Windows	$50,000.00	$0.00	$50,000.00
4	02/01/2018	Car Fleet Electrificati	Funding Electric Vehicles	$6,000.00	$0.00	$6,000.00
3	02/01/2018	Automation Projects	Automating our warehouse	$24,000.00	$0.00	$24,000.00
2	02/01/2018	Music Education	Support for music education	$6,000.00	$0.00	$6,000.00
1	10/01/2017	Science Endowment	Support for science education	$12,000.00	$4,000.00	$8,000.00

PAYMENT INFORMATION

PLEDGE ID	DATE	AMOUNT	CHECK NUMBER	RECEIPT NUMBER
1	01/15/2018	$1,000.00	1125	23599
1	12/15/2017	$1,000.00	1124	23598
1	11/15/2017	$1,000.00	1123	23597
1	10/15/2017	$1,000.00	1122	23596

Total of Expected Payments for all Outstanding Pledges:	$49,500.00
Total of Actual Payments made on all Outstanding Pledges:	$4,000.00
Please Pay This Amount:	$45,500.00

YOUR PAYMENTS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Pledge Statements: Monthly Pledges

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will print pledge statements for all donors who have any outstanding monthly payment pledges which have a payment due and which have not been written off. This report is normally run directly so that it may in turn run its own selection to find just the donors with any outstanding monthly payment pledges. However, if you wish control over which donors receive statements, you may run your own selection of monthly payers to use with this report. You can also use this report to print statements on demand for donors, directly from the DonorQuest Main Information window. To do this, simply lookup the donor as you would to add a payment for them, then with their record highlighted, click on the Printer icon on the DonorQuest tool bar. Confirm the donor's name, then choose this report layout from the report menu.

Note: There are also Quarterly, Semester, and Yearly payment versions of this report. Generally, monthly statements should be run near the beginning of each month, Quarterly near the start of each quarter, semester near the start of each six month semester (usual January and June), and yearly statements near the beginning of each year. It's not terribly important how far into each payment period you run the corresponding statements, but consistency is important so that your donors get their statements at regular intervals.

ABC Nonprofit Organization
701 Galer Street
Seattle, WA 98109
(206) 270-1050

Statement Date: 02/11/2018

Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

PLEDGE INFORMATION

DATE	REFERENCE	DESCRIPTION	AMOUNT	CREDIT	BALANCE
02/01/2018	Music Education	Support for music education	$6,000.00	$0.00	$6,000.00
10/01/2017	Science Endowment	Support for science education	$12,000.00	$4,000.00	$8,000.00

Total of Expected Payments for all Outstanding Monthly Pledges:	$5,500.00
Total of Actual Payments made on all Outstanding Monthly Pledges:	$4,000.00
Please Pay This Amount:	$1,500.00

YOUR PAYMENTS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Pledge Statements: Monthly Pledges, With Payment History

Description

Designed to be run directly or used with a Header-based Selection Result, this report layout will print pledge statements for all donors who have any outstanding monthly payment pledges which have a payment due and which have not been written off. It will also show the history of all payments applied so far to each monthly pledge for each donor. This report is normally run directly so that it may in turn run its own selection to find just the donors with any outstanding monthly payment pledges. However, if you wish control over which donors receive statements, you may run your own selection of monthly payers to use with this report. You can also use this report to print statements on demand for donors, directly from the DonorQuest Main Information window. To do this, simply lookup the donor as you would to add a payment for them, then with their record highlighted, click on the Printer icon on the DonorQuest tool bar. Confirm the donor's name, then choose this report layout from the report menu.

Note: There are also Quarterly, Semester, and Yearly payment versions of this report.

ABC Nonprofit Organization
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Seattle, WA 98109
(206) 270-1050

Statement Date: 02/11/2018

Elon Musk
SpaceX
3141 Tesla Ave.
Fremont, CA 94538

Identification No.: 53

PLEDGE INFORMATION

PLEDGE ID	DATE	REFERENCE	DESCRIPTION	AMOUNT	CREDIT	BALANCE
2	02/01/2018	Music Education	Support for music education	$6,000.00	$0.00	$6,000.00
1	10/01/2017	Science Endowment	Support for science education	$12,000.00	$4,000.00	$8,000.00

PAYMENT INFORMATION

PLEDGE ID	DATE	AMOUNT	CHECK NUMBER	RECEIPT NUMBER
1	01/15/2018	$1,000.00	1125	23599
1	12/15/2017	$1,000.00	1124	23598
1	11/15/2017	$1,000.00	1123	23597
1	10/15/2017	$1,000.00	1122	23596

Total of Expected Payments for all Outstanding Monthly Pledges:	$5,500.00
Total of Actual Payments made on all Outstanding Monthly Pledges:	$4,000.00
Please Pay This Amount:	$1,500.00

YOUR PAYMENTS ARE STILL NEEDED AND ALWAYS APPRECIATED!
QUESTIONS? PLEASE CALL (206) 270-1050

Report Menu Name

Pledge Statements: Monthly, Windowed Envelopes

Description

This report layout has the same content as the, "Pledge Statements: Monthly Pledges" report, but the donor's name and address are positioned such that they can be seen through a windowed envelope.

Note: There are also Quarterly, Semester, and Yearly payment versions of this report.

Report Menu Name

Pledge Statements: Monthly, Windowed Envelopes, With Payment History

Description

This report layout has the same content as the, "Pledge Statements: Monthly Pledges, With Payment History" report, but the donor's name and address are positioned such that they can be seen through a windowed envelope.

Note: There are also Quarterly, Semester, and Yearly payment versions of this report.

8.2 Sample Donation Reports

Report Menu Name

Donations - Amount And Count By State With Percentage

Description

Designed to be used with a Donation-based Selection Result, this report layout will show a total and gift count by state, along with a percentage of all gifts each state has for all the gifts included in the report. In this example, a selection was run for all monetary donations, and used with the report.

02/28/2018 **Donations - Amount And Count By State With Percentage** **Page 1**

Monetary (Non-Alternate-Unit) Donations

State	Amount	Count	Percentage
CA	629,953.23	146	64.9
NY	1,000.00	1	0.4
OR	2,160.00	6	2.7
WA	131,256.00	72	32.0
	764,369.23	225	100.0

Report Menu Name

Donations - Analysis of Proceeds and Return Rates Based On Donation Stimulus Codes

Description

This report layout is a bit of an anomaly, designed to help some of our customers who chose a novel approach to tracking returns from campaign mailings. They would mass add a donation of zero amount for each constituent receiving a particular campaign mailing (given by the donation stimulus code). After all donations had come in for a given campaign, then would run this report, then select and mass delete all the remaining zero donations for the campaign. While this approach certainly works, the preferred way to track returns is to use the solicitation tracking feature in DonorQuest.

02/12/2018 **Donations - Analysis of Proceeds and Return Rates Based On Donation Stimulus Codes** **Page 1**

Universal Qualification

Stimulus	Total Count	Zero Amount Count	Non-Zero Amount Count	% Who Gave	Total	Average
	1	0	1	100.00	50.00	50.00
2001 Annual Campaign	1	0	1	100.00	200.00	200.00
2002 Annual Campaign	4	0	4	100.00	3,010.00	752.50
2003 Annual Campaign	12	0	12	100.00	11,750.00	979.17
2004 Annual Campaign	3	0	3	100.00	3,000.00	1,000.00
2005 Annual Campaign	1	0	1	100.00	1,500.00	1,500.00
2006 Annual Campaign	2	0	2	100.00	10,500.00	5,250.00
2007 Annual Campaign	2	0	2	100.00	10,900.00	5,450.00
2008 Annual Campaign	3	0	3	100.00	18,500.00	6,166.67
2009 Annual Campaign	4	0	4	100.00	17,700.00	4,425.00
2010 Annual Campaign	6	0	6	100.00	28,200.00	4,700.00
2011 Annual Campaign	11	0	11	100.00	38,600.00	3,509.09
2012 Annual Campaign	17	0	17	100.00	53,749.56	3,161.74
2013 Annual Campaign	38	0	38	100.00	57,631.67	1,516.62
2014 Annual Campaign	11	0	11	100.00	65,860.00	5,987.27
2015 Annual Campaign	15	0	15	100.00	85,500.00	5,700.00
2016 Annual Campaign	9	0	9	100.00	127,600.00	14,177.78
2017 Annual Campaign	12	0	12	100.00	82,850.00	6,904.17
2018 Annual Campaign	2	0	2	100.00	5,500.00	2,750.00
Annual Christmas Campaign	3	0	3	100.00	21,500.00	7,166.67
Breakfast Special Event	5	0	5	100.00	10,495.00	2,099.00
Music Festival	7	0	7	100.00	2,710.00	387.14
Science Endowment	4	0	4	100.00	4,000.00	1,000.00
Unsolicited	48	0	48	100.00	81,563.00	1,699.23
	221	0	221	100.00	742,869.23	3,361.40

Report Menu Name

Donations - Analysis of Proceeds and Return Rates From Solicitation Letters Sent

Description

This is a variation on the, "Donations - Analysis of Proceeds and Return Rates Based On Donation Stimulus Codes" report, showing return rates by the solicitation letter sent.

02/28/2018 Donations - Analysis of Proceeds and Return Rates From Solicitation Letters Sent Page 1

Monetary (Non-Alternate-Unit) Donations

Letter	Total Count	Zero Amount Count	Non-Zero Amount Count	% Who Gave	Total	Average
TC	15	0	15	100.00	36,320.56	2,421.37
T1	185	0	185	100.00	657,707.67	3,555.18
T2	20	0	20	100.00	68,191.00	3,409.55
	220	0	220	100.00	762,219.23	3,464.63

Report Menu Name

Donations - Campaign Summary

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total revenue by campaign (donation stimulus), along with the total number of gifts, and an average gift amount for each campaign code.

02/12/2018 Donations - Campaign Summary Page 1

Universal Qualification

Campaign	Description	Total Given	# of Gifts	Average
		50.00	1	50.00
01AC	2001 Annual Campaign	200.00	1	200.00
02AC	2002 Annual Campaign	3,010.00	4	752.50
03AC	2003 Annual Campaign	11,750.00	12	979.17
04AC	2004 Annual Campaign	3,000.00	3	1,000.00
05AC	2005 Annual Campaign	1,500.00	1	1,500.00
06AC	2006 Annual Campaign	10,500.00	2	5,250.00
07AC	2007 Annual Campaign	10,900.00	2	5,450.00
08AC	2008 Annual Campaign	18,500.00	3	6,166.67
09AC	2009 Annual Campaign	17,700.00	4	4,425.00
10AC	2010 Annual Campaign	28,200.00	6	4,700.00
11AC	2011 Annual Campaign	38,600.00	11	3,509.09
12AC	2012 Annual Campaign	53,749.56	17	3,161.74
13AC	2013 Annual Campaign	57,631.67	38	1,516.62
14AC	2014 Annual Campaign	65,860.00	11	5,987.27
15AC	2015 Annual Campaign	85,500.00	15	5,700.00
16AC	2016 Annual Campaign	127,600.00	9	14,177.78
17AC	2017 Annual Campaign	82,850.00	12	6,904.17
18AC	2018 Annual Campaign	5,500.00	2	2,750.00
ACC	Annual Christmas Campaign	21,500.00	3	7,166.67
BRKFST	Breakfast Special Event	10,495.00	5	2,099.00
MUSIC	Music Festival	2,710.00	7	387.14
SE	Science Endowment	4,000.00	4	1,000.00
UNSOL	Unsolicited	81,563.00	48	1,699.23
		742,869.23	221	3,361.40

Report Menu Name

Donations - Campaign Summary (Non-Dollar Gifts)

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total giving campaign (donation stimulus) for non-monetary donations, such as hours of time volunteered. Also shown are the total number of gifts, and an average gift amount for each campaign code.

02/12/2018 **Donations - Campaign Summary** **Page 1**

Universal Qualification

Campaign	Description	Total Given	# of Gifts
11AC	2011 Annual Campaign	20.00	1
VOL	Volunteer Hours	16.00	2
		36.00	3

Report Menu Name

Donations - Comparison of Giving for each Stimulus and Donor for 5 Calendar Years - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total giving for each constituent for the current and past four calendar years by donation stimulus. A total for the five years is also shown. Normally you would run a donation-based selection for just the Stimulus codes you wish to report on and use it with this report layout.

02/12/2018 **Donations - Comparison of Giving for each Stimulus and Donor for 5 Calendar Years - Summary** **Page 3**

Universal Qualification

Stimulus	Description	Giving Entity	2018	2017	2016	2015	2014	5-Year Total
18AC	2018 Annual Campaign	Intrepid Systems Inc.	500.00	0.00	0.00	0.00	0.00	500.00
18AC	2018 Annual Campaign	Musk, Elon	5,000.00	0.00	0.00	0.00	0.00	5,000.00
ACC	Annual Christmas Campaign	Musk, Elon	0.00	10,000.00	6,500.00	5,000.00	0.00	21,500.00
BRKFST	Breakfast Special Event	Bowie, Denise	0.00	0.00	0.00	0.00	0.00	0.00
BRKFST	Breakfast Special Event	Burke, James	0.00	0.00	0.00	0.00	0.00	0.00
BRKFST	Breakfast Special Event	Lodge, John	0.00	0.00	0.00	0.00	0.00	0.00
BRKFST	Breakfast Special Event	Progressive Music, Inc.	0.00	0.00	0.00	0.00	725.00	725.00
MUSIC	Music Festival	Burke, James	0.00	0.00	0.00	0.00	0.00	0.00
MUSIC	Music Festival	Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00	0.00
MUSIC	Music Festival	Waters, Roger	0.00	0.00	0.00	0.00	0.00	0.00
SE	Science Endowment	Musk, Elon	1,000.00	3,000.00	0.00	0.00	0.00	4,000.00
UNSOL	Unsolicited	Baker, Thomas	0.00	0.00	2,500.00	1,000.00	1,000.00	4,500.00
UNSOL	Unsolicited	Bowie, Denise	0.00	0.00	0.00	5,000.00	0.00	5,000.00
UNSOL	Unsolicited	Burke, James	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Decca Records	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Foster, James	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Hayward, Justin	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00	7,500.00
UNSOL	Unsolicited	Lodge, John	0.00	0.00	0.00	5,700.00	7,500.00	13,200.00
UNSOL	Unsolicited	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	0.00	600.00
UNSOL	Unsolicited	Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Waters, Roger	0.00	0.00	0.00	0.00	10,000.00	10,000.00
			6,550.00	96,450.00	136,600.00	107,200.00	87,585.00	434,385.00

Report Menu Name

Donations - Comparison of Giving for each Stimulus and Donor for 5 Fiscal Years - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total giving for each constituent for the current and past four fiscal years by donation stimulus. A total for the five years is also shown. Normally you would run a donation-based selection for just the Stimulus codes you wish to report on and use it with this report layout.

02/12/2018 Donations - Comparison of Giving for each Stimulus and Donor for 5 Fiscal Years - Summary Page 3

Universal Qualification

Stimulus	Description	Giving Entity	2018	2017	2016	2015	2014	5-Year Total
18AC	2018 Annual Campaign	Intrepid Systems Inc.	500.00	0.00	0.00	0.00	0.00	500.00
18AC	2018 Annual Campaign	Musk, Elon	5,000.00	0.00	0.00	0.00	0.00	5,000.00
ACC	Annual Christmas Campaign	Musk, Elon	10,000.00	6,500.00	5,000.00	0.00	0.00	21,500.00
BRKFST	Breakfast Special Event	Bowie, Denise	0.00	0.00	0.00	0.00	0.00	0.00
BRKFST	Breakfast Special Event	Burke, James	0.00	0.00	0.00	0.00	0.00	0.00
BRKFST	Breakfast Special Event	Lodge, John	0.00	0.00	0.00	0.00	0.00	0.00
BRKFST	Breakfast Special Event	Progressive Music, Inc.	0.00	0.00	0.00	0.00	725.00	725.00
MUSIC	Music Festival	Burke, James	0.00	0.00	0.00	0.00	60.00	60.00
MUSIC	Music Festival	Intrepid Systems Inc.	0.00	0.00	0.00	0.00	0.00	0.00
MUSIC	Music Festival	Waters, Roger	0.00	0.00	0.00	0.00	0.00	0.00
SE	Science Endowment	Musk, Elon	4,000.00	0.00	0.00	0.00	0.00	4,000.00
UNSOL	Unsolicited	Baker, Thomas	0.00	0.00	2,500.00	1,000.00	1,000.00	4,500.00
UNSOL	Unsolicited	Bowie, Denise	0.00	0.00	0.00	5,000.00	0.00	5,000.00
UNSOL	Unsolicited	Burke, James	0.00	0.00	0.00	0.00	632.00	632.00
UNSOL	Unsolicited	Decca Records	0.00	0.00	0.00	0.00	200.00	200.00
UNSOL	Unsolicited	Foster, James	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Gore, Martin L.	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Hayward, Justin	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00	7,500.00
UNSOL	Unsolicited	Lodge, John	0.00	0.00	0.00	13,200.00	0.00	13,200.00
UNSOL	Unsolicited	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Progressive Music, Inc.	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	600.00	1,200.00
UNSOL	Unsolicited	Trek Foundation	0.00	0.00	0.00	0.00	0.00	0.00
UNSOL	Unsolicited	Waters, Roger	0.00	0.00	0.00	10,000.00	0.00	10,000.00
			20,350.00	210,150.00	94,100.00	101,300.00	37,001.00	462,901.00

Report Menu Name

Donations - Comparison of Giving for each Stimulus for 5 Calendar Years - Summary

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total giving by donation stimulus for the current and past four calendar years by donation stimulus. A total for the five years is also shown.

02/12/2018 Donations - Comparison of Giving for each Stimulus for 5 Calendar Years - Summary Page 1

All Donations

Stimulus	Description	2018	2017	2016	2015	2014	5-Year Total
		50.00	0.00	0.00	0.00	0.00	50.00
01AC	2001 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
02AC	2002 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
03AC	2003 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
04AC	2004 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
05AC	2005 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
06AC	2006 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
07AC	2007 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
08AC	2008 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
09AC	2009 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
10AC	2010 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
11AC	2011 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
12AC	2012 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
13AC	2013 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
14AC	2014 Annual Campaign	0.00	0.00	0.00	0.00	65,860.00	65,860.00
15AC	2015 Annual Campaign	0.00	0.00	0.00	85,500.00	0.00	85,500.00
16AC	2016 Annual Campaign	0.00	0.00	127,600.00	0.00	0.00	127,600.00
17AC	2017 Annual Campaign	0.00	82,850.00	0.00	0.00	0.00	82,850.00
18AC	2018 Annual Campaign	5,500.00	0.00	0.00	0.00	0.00	5,500.00
ACC	Annual Christmas Campaign	0.00	10,000.00	6,500.00	5,000.00	0.00	21,500.00
BRKFST	Breakfast Special Event	0.00	0.00	0.00	0.00	725.00	725.00
MUSIC	Music Festival	0.00	0.00	0.00	0.00	0.00	0.00
SE	Science Endowment	1,000.00	3,000.00	0.00	0.00	0.00	4,000.00
UNSOL	Unsolicited	0.00	600.00	2,500.00	16,700.00	21,000.00	40,800.00
		6,550.00	96,450.00	136,600.00	107,200.00	87,585.00	434,385.00

Report Menu Name

Donations - Comparison of Giving for each Stimulus for 5 Fiscal Years - Summary

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total giving by donation stimulus for the current and past four calendar years by donation stimulus. A total for the five years is also shown.

02/12/2018 Donations - Comparison of Giving for each Stimulus for 5 Fiscal Years - Summary Page 1

All Donations

Stimulus	Description	2018	2017	2016	2015	2014	5-Year Total
		50.00	0.00	0.00	0.00	0.00	50.00
01AC	2001 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
02AC	2002 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
03AC	2003 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
04AC	2004 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
05AC	2005 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
06AC	2006 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
07AC	2007 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
08AC	2008 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
09AC	2009 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
10AC	2010 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
11AC	2011 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
12AC	2012 Annual Campaign	0.00	0.00	0.00	0.00	0.00	0.00
13AC	2013 Annual Campaign	0.00	0.00	0.00	0.00	27,024.00	27,024.00
14AC	2014 Annual Campaign	0.00	0.00	0.00	61,600.00	4,260.00	65,860.00
15AC	2015 Annual Campaign	0.00	0.00	80,000.00	5,500.00	0.00	85,500.00
16AC	2016 Annual Campaign	0.00	121,000.00	6,600.00	0.00	0.00	127,600.00
17AC	2017 Annual Campaign	800.00	82,050.00	0.00	0.00	0.00	82,850.00
18AC	2018 Annual Campaign	5,500.00	0.00	0.00	0.00	0.00	5,500.00
ACC	Annual Christmas Campaign	10,000.00	6,500.00	5,000.00	0.00	0.00	21,500.00
BRKFST	Breakfast Special Event	0.00	0.00	0.00	0.00	725.00	725.00
MUSIC	Music Festival	0.00	0.00	0.00	0.00	60.00	60.00
SE	Science Endowment	4,000.00	0.00	0.00	0.00	0.00	4,000.00
UNSOL	Unsolicited	0.00	600.00	2,500.00	34,200.00	4,932.00	42,232.00
		20,350.00	210,150.00	94,100.00	101,300.00	37,001.00	462,901.00

Report Menu Name

Donations - Comparison Of Year-To-Year Giving By Calendar Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by constituent for the current and past four calendar years.

02/12/2018 **Donations - Comparison Of Year-To-Year Giving By Calendar Year** Page 1

All Donations

ID Num	Giving Entity	2018	2017	2016	2015	2014
6	1984 Productions	0.00	0.00	0.00	0.00	750.00
28	Bach Memorial Account	0.00	500.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	750.00	2,600.00	2,000.00	1,100.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00
20	Burke, James	0.00	800.00	500.00	0.00	1,600.00
11	Decca Records	50.00	0.00	0.00	0.00	0.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	560.00
12	Hayward, Justin	0.00	9,700.00	8,000.00	7,500.00	6,500.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
32	Intrepid Systems Inc.	500.00	1,200.00	5,000.00	2,000.00	1,000.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,500.00
13	Lennon, John	0.00	0.00	0.00	0.00	5,000.00
23	Lodge, John	0.00	0.00	0.00	5,700.00	7,500.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	6,000.00	20,000.00	12,500.00	9,500.00	0.00
29	Northern Songs Limited, (U.S. Division)	0.00	0.00	108,000.00	70,000.00	50,000.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	725.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	0.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	350.00
10	Waters, Roger	0.00	4,000.00	0.00	0.00	10,000.00
		6,550.00	96,450.00	136,600.00	107,200.00	87,585.00

Report Menu Name

Donations - Comparison Of Year-To-Year Giving By Fiscal Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by constituent for the current and past four fiscal years.

02/12/2018 **Donations - Comparison Of Year-To-Year Giving By Fiscal Year** **Page 1**

All Donations

ID Num	Giving Entity	2018	2017	2016	2015	2014
6	1984 Productions	0.00	0.00	0.00	0.00	1,300.00
28	Bach Memorial Account	0.00	500.00	0.00	0.00	0.00
15	Baker, Thomas	0.00	750.00	3,100.00	1,600.00	1,000.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00
20	Burke, James	800.00	0.00	500.00	0.00	8,082.00
11	Decca Records	50.00	0.00	0.00	0.00	200.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	760.00
12	Hayward, Justin	0.00	17,700.00	7,500.00	6,500.00	6,000.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00
32	Intrepid Systems Inc.	500.00	6,200.00	2,000.00	0.00	1,000.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,600.00
13	Lennon, John	0.00	0.00	0.00	5,000.00	12,000.00
23	Lodge, John	0.00	0.00	0.00	13,200.00	0.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	19,000.00	13,500.00	11,000.00	4,500.00	0.00
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	50,000.00	0.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	1,609.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	600.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00
3	Trek Foundation	0.00	0.00	0.00	0.00	1,850.00
10	Waters, Roger	0.00	4,000.00	0.00	10,000.00	0.00
		20,350.00	210,150.00	94,100.00	101,300.00	37,001.00

Report Menu Name

Donations - Comparison Of Year-To-Year Giving By Fiscal Year With Totals

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by constituent for the current and past four fiscal years, along with a total for the five years.

02/12/2018 Donations - Comparison Of Year-To-Year Giving By Fiscal Year With Totals Page 1

All Donations

ID Num	Giving Entity	2018	2017	2016	2015	2014	Total
6	1984 Productions	0.00	0.00	0.00	0.00	1,300.00	1,300.00
28	Bach Memorial Account	0.00	500.00	0.00	0.00	0.00	500.00
15	Baker, Thomas	0.00	750.00	3,100.00	1,600.00	1,000.00	6,450.00
18	Bowie, Denise	0.00	8,450.00	0.00	5,500.00	0.00	13,950.00
20	Burke, James	800.00	0.00	500.00	0.00	8,082.00	9,382.00
11	Decca Records	50.00	0.00	0.00	0.00	200.00	250.00
17	Foster, James	0.00	450.00	0.00	0.00	0.00	450.00
4	Gore, Martin L.	0.00	0.00	0.00	0.00	760.00	760.00
12	Hayward, Justin	0.00	17,700.00	7,500.00	6,500.00	6,000.00	37,700.00
24	IBM Corporation	0.00	0.00	0.00	0.00	0.00	0.00
32	Intrepid Systems Inc.	500.00	6,200.00	2,000.00	0.00	1,000.00	9,700.00
21	Knight, Paula	0.00	0.00	0.00	5,000.00	2,600.00	7,600.00
13	Lennon, John	0.00	0.00	0.00	5,000.00	12,000.00	17,000.00
23	Lodge, John	0.00	0.00	0.00	13,200.00	0.00	13,200.00
5	Mozart Memorial Account	0.00	0.00	0.00	0.00	0.00	0.00
53	Musk, Elon	19,000.00	13,500.00	11,000.00	4,500.00	0.00	48,000.00
29	Northern Songs Limited, (U.S. Division)	0.00	108,000.00	70,000.00	50,000.00	0.00	228,000.00
2	Progressive Music, Inc.	0.00	0.00	0.00	0.00	1,609.00	1,609.00
7	Schmidt Aeronautic Foundation	0.00	600.00	0.00	0.00	600.00	1,200.00
8	Scott, Montgomery	0.00	0.00	0.00	0.00	0.00	0.00
26	Smith, John	0.00	0.00	0.00	0.00	0.00	0.00
27	The Corporation For Public Broadcasting	0.00	50,000.00	0.00	0.00	0.00	50,000.00
3	Trek Foundation	0.00	0.00	0.00	0.00	1,850.00	1,850.00
10	Waters, Roger	0.00	4,000.00	0.00	10,000.00	0.00	14,000.00
		20,350.00	210,150.00	94,100.00	101,300.00	37,001.00	462,901.00

Report Menu Name

Donations - Count And Total Of Donations By Zip With Percentages

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by 5-digit zip code, along with the number of donations for each constituent, and the percentage of all donations included in the report each count represents. The report will automatically filter out non-monetary donations, so the count percentage may not always be 100, depending on the combination of donation types in the selection result you use with the report.

03/01/2018 **Donations - Count And Total Of Donations By 5-Digit Zip With Percentages** **Page 1**

All Donations

Zip	Donation Amount	Count	Percentage
12345	1,000.00	1	0.4
92104	500.00	1	0.4
94161	361,000.00	15	6.6
94175	70,000.00	2	0.9
94300	1,350.00	7	3.1
94304	24,014.00	29	12.8
94403	20,450.00	7	3.1
94538	48,000.00	11	4.8
95070	10,325.00	16	7.0
95112	21,550.00	28	12.3
95119	20,950.00	5	2.2
95131	14,814.23	3	1.3
95133	11,800.00	12	5.3
95135	500.00	1	0.4
95991	13,500.00	4	1.8
96067	11,200.00	5	2.2
97401	2,160.00	6	2.6
98109	131,256.00	72	31.7
	764,369.23	225	99.0

Report Menu Name

Donations - Count And Total Of Donations By County With Percentages

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total revenue by County, along with the number of donations in each county, and the percentage of all donations included in the report each count represents.

02/28/2018 **Donations - Count And Total Of Donations By County With Percentages** **Page 1**

Monetary Donations

County	Donation Amount	Count	Percentage
Alameda	48,000.00	11	5.0
King	131,156.00	71	32.3
Lane	2,160.00	6	2.7
Palo Alto	1,300.00	6	2.7
San Francisco	431,000.00	17	7.7
San Mateo	20,450.00	7	3.2
Santa Clara	102,453.23	92	41.8
Schenectady	1,000.00	1	0.5
Siskiyou	11,200.00	5	2.3
Sutter	13,500.00	4	1.8
	762,219.23	220	100.0

Report Menu Name

Donations - Count And Total Of Donations By Donor Type With Percentages

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total revenue by Donor Type, along with the number of donations in each type, and the percentage of all donations included in the report each count represents.

02/12/2018 **Donations - Count And Total Of Donations By Donor Type With Percentages** **Page 1**

All Donations

Donor_Type	Donation Amount	Count	Percentage
C - Corporation	444,264.23	52	23.4
F - Foundation	17,900.00	10	4.5
I - Individual	276,059.00	149	67.1
M - Memorial Record	1,750.00	4	1.8
O - Organization	2,896.00	6	2.7
	742,869.23	221	99.5

Report Menu Name

Donations - Count And Total Of Donations By Giving Entity With Percentages

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by Giving Entity (either the personal name, or organization name for non-individual constituents), along with the number of donations for each constituent, and the percentage of all donations included in the report each count represents.

03/01/2018 **Donations - Count And Total Of Donations By Giving Entity With Percentages** **Page 1**

Monetary Donations

Giving Entity	Donation Amount	Count	Percentage
1984 Productions	2,000.00	5	2.2
Bach Memorial Account	1,250.00	3	1.3
Baker, Thomas	21,550.00	28	12.4
Bowie, Denise	20,950.00	5	2.2
Burke, James	24,014.00	29	12.9
Decca Records	1,350.00	7	3.1
Foster, James	1,625.00	6	2.7
Gore, Martin L.	2,160.00	6	2.7
Hayward, Justin	94,010.00	38	16.9
IBM Corporation	14,814.23	3	1.3
Intrepid Systems Inc.	33,100.00	25	11.1
Knight, Paula	11,800.00	12	5.3
Koneig, John	500.00	1	0.4
Lennon, John	17,000.00	2	0.9
Lodge, John	13,500.00	4	1.8
Mozart Memorial Account	500.00	1	0.4
Musk, Elon	48,000.00	11	4.9
Northern Songs Limited, (U.S. Divisio	344,000.00	13	5.8
Progressive Music, Inc.	2,896.00	6	2.7
Schmidt Aeronautic Foundation	6,700.00	5	2.2
Scott, Montgomery	1,000.00	1	0.4
Smith, John	200.00	1	0.4
The Corporation For Public Broadcast	70,000.00	2	0.9
Trek Foundation	11,200.00	5	2.2
Waters, Roger	20,250.00	6	2.7
	764,369.23	225	100.0

Report Menu Name

Donations - Count And Total Of Donations By Zip With Percentages

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by complete (9-digit) zip code, along with the number of donations for each constituent, and the percentage of all donations included in the report each count represents. The report will automatically filter out non-monetary donations, so the count percentage may not always be 100, depending on the combination of donation types in the selection result you use with the report.

02/12/2018 **Donations - Count And Total Of Donations By Zip With Percentages** **Page 1**

All Donations

Zip	Donation Amount	Count	Percentage
12345	1,000.00	1	0.5
92104	500.00	1	0.5
94161-2323	360,500.00	14	6.3
94175	50,000.00	1	0.5
94300-2112	850.00	6	2.7
94304-7899	24,014.00	29	13.1
94403	20,450.00	7	3.2
94538	48,000.00	11	5.0
95070-1234	6,700.00	5	2.3
95070-3212	3,625.00	11	5.0
95112-3211	21,550.00	28	12.6
95119-2312	20,950.00	5	2.3
95131-1234	14,814.23	3	1.4
95133-4333	11,800.00	12	5.4
95991-3171	13,500.00	4	1.8
96067-1234	11,200.00	5	2.3
97401	2,160.00	6	2.7
98109	128,360.00	66	29.7
98109-1234	2,896.00	6	2.7
	742,869.23	221	99.5

Report Menu Name

Donations - Count Of Gifts In Dollar Ranges By Calendar Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will count the number of donations in five specific amount ranges by calendar year.

02/12/2018 **Donations - Count Of Gifts In Dollar Ranges By Calendar Year** Page 1

All Donations

Year	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
1997	1	1	0	0	0
1998	0	1	0	0	0
1999	1	1	1	0	0
2000	0	0	0	1	0
2001	0	1	1	1	0
2002	1	0	0	1	4
2003	0	0	0	1	12
2004	0	0	0	0	4
2005	0	0	0	0	2
2006	1	0	0	1	1
2007	0	1	0	2	2
2008	1	1	0	0	3
2009	0	1	1	1	3
2010	0	2	0	1	5
2011	0	1	3	4	5
2012	2	8	2	5	8
2013	3	10	8	17	14
2014	0	1	3	3	9
2015	0	10	0	2	9
2016	0	1	0	1	9
2017	0	2	1	4	10
2018	1	0	0	1	2
	11	42	20	46	102

Report Menu Name

Donations - Count Of Gifts In Dollar Ranges By Calendar Year And Week

Description

Designed to be used with a Donation-based Selection Result, this report layout will count the number of donations in five specific amount ranges by calendar year and week. The example shown below is of the last page of the report, showing totals.

02/12/2018 Donations - Count Of Gifts In Dollar Ranges By Calendar Year And Week Page 5
All Donations

Year	Week	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
2015	36	0	0	0	0	1
2015	37	0	1	0	0	0
2015	39	0	0	0	0	1
2015	40	0	0	0	0	1
2015	41	0	1	0	0	0
2015	45	0	1	0	0	0
2015	50	0	0	0	0	1
2016	4	0	0	0	0	1
2016	9	0	0	0	1	0
2016	14	0	0	0	0	1
2016	20	0	1	0	0	0
2016	44	0	0	0	0	1
2016	45	0	0	0	0	3
2016	47	0	0	0	0	1
2016	48	0	0	0	0	1
2016	50	0	0	0	0	1
2017	1	0	0	0	1	0
2017	5	0	0	1	0	0
2017	9	0	0	0	0	1
2017	10	0	0	0	0	1
2017	13	0	0	0	1	4
2017	15	0	0	0	1	0
2017	17	0	2	0	0	0
2017	42	0	0	0	0	1
2017	46	0	0	0	0	1
2017	50	0	0	0	0	2
2017	53	0	0	0	1	0
2018	2	1	0	0	0	1
2018	3	0	0	0	1	1
		11	42	20	46	102

Report Menu Name

Donations - Count Of Gifts In Dollar Ranges By Fiscal Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will count the number of donations in five specific amount ranges by fiscal year.

02/12/2018 Donations - Count Of Gifts In Dollar Ranges By Fiscal Year Page 1
All Donations

Year	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
1997	1	1	0	0	0
1998	0	1	0	0	0
1999	1	1	1	0	0
2000	0	0	0	1	0
2001	0	1	1	1	0
2002	0	0	0	1	1
2003	1	0	0	1	9
2004	0	0	0	0	10
2005	0	0	0	0	2
2006	1	0	0	0	1
2007	0	1	0	2	2
2008	1	1	0	1	1
2009	0	1	1	1	4
2010	0	1	0	1	3
2011	0	1	3	4	6
2012	0	2	1	4	7
2013	4	12	4	10	14
2014	1	5	8	11	7
2015	0	6	0	2	10
2016	0	6	0	1	6
2017	0	2	1	3	13
2018	1	0	0	2	6
	11	42	20	46	102

Report Menu Name

Donations - Count Of Gifts In Dollar Ranges By Fiscal Year And Week

Description

Designed to be used with a Donation-based Selection Result, this report layout will count the number of donations in five specific amount ranges by calendar year and week. The example shown below is of the last page of the report, showing totals.

02/12/2018 **Donations - Count Of Gifts In Dollar Ranges By Fiscal Year And Week** Page 5

All Donations

Year	Week	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
2016	11	0	1	0	0	0
2016	13	0	0	0	0	1
2016	14	0	0	0	0	1
2016	15	0	1	0	0	0
2016	19	0	1	0	0	0
2016	24	0	0	0	0	1
2016	30	0	0	0	0	1
2016	35	0	0	0	1	0
2016	40	0	0	0	0	1
2016	46	0	1	0	0	0
2017	18	0	0	0	0	1
2017	19	0	0	0	0	3
2017	21	0	0	0	0	1
2017	22	0	0	0	0	1
2017	24	0	0	0	0	1
2017	28	0	0	0	1	0
2017	32	0	0	1	0	0
2017	36	0	0	0	0	1
2017	37	0	0	0	0	1
2017	40	0	0	0	1	4
2017	42	0	0	0	1	0
2017	44	0	2	0	0	0
2018	17	0	0	0	0	1
2018	21	0	0	0	0	1
2018	25	0	0	0	0	2
2018	28	0	0	0	1	0
2018	29	1	0	0	0	1
2018	30	0	0	0	1	1
		11	42	20	46	102

Report Menu Name

Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by calendar year for donations in five dollar ranges.

02/12/2018 Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year Page 1

All Donations

Year	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
1997	50.00	100.00	0.00	0.00	0.00
1998	0.00	200.00	0.00	0.00	0.00
1999	50.00	100.00	400.00	0.00	0.00
2000	0.00	0.00	0.00	600.00	0.00
2001	0.00	200.00	400.00	750.00	0.00
2002	10.00	0.00	0.00	600.00	4,000.00
2003	0.00	0.00	0.00	750.00	12,000.00
2004	0.00	0.00	0.00	0.00	5,500.00
2005	0.00	0.00	0.00	0.00	6,500.00
2006	50.00	0.00	0.00	500.00	10,000.00
2007	0.00	100.00	0.00	1,400.00	15,000.00
2008	50.00	200.00	0.00	0.00	18,500.00
2009	0.00	100.00	400.00	500.00	17,200.00
2010	0.00	400.00	0.00	600.00	28,000.00
2011	0.00	200.00	1,100.00	2,450.00	36,000.00
2012	100.00	1,327.00	700.00	3,435.00	62,684.56
2013	148.00	1,447.00	3,016.00	13,142.00	57,524.67
2014	0.00	100.00	1,100.00	1,885.00	84,500.00
2015	0.00	1,000.00	0.00	1,200.00	105,000.00
2016	0.00	100.00	0.00	500.00	136,000.00
2017	0.00	200.00	450.00	2,650.00	93,150.00
2018	50.00	0.00	0.00	500.00	6,000.00
	508.00	5,774.00	7,566.00	31,462.00	697,559.23

Report Menu Name

Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year And Week

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by calendar year and week for donations in five dollar ranges.

02/12/2018 Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year And Week Page 5

All Donations

Year	Week	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
2015	36	0.00	0.00	0.00	0.00	2,000.00
2015	37	0.00	100.00	0.00	0.00	0.00
2015	39	0.00	0.00	0.00	0.00	7,500.00
2015	40	0.00	0.00	0.00	0.00	70,000.00
2015	41	0.00	100.00	0.00	0.00	0.00
2015	45	0.00	100.00	0.00	0.00	0.00
2015	50	0.00	0.00	0.00	0.00	5,000.00
2016	4	0.00	0.00	0.00	0.00	2,500.00
2016	9	0.00	0.00	0.00	500.00	0.00
2016	14	0.00	0.00	0.00	0.00	6,000.00
2016	20	0.00	100.00	0.00	0.00	0.00
2016	44	0.00	0.00	0.00	0.00	8,000.00
2016	45	0.00	0.00	0.00	0.00	94,000.00
2016	47	0.00	0.00	0.00	0.00	5,000.00
2016	48	0.00	0.00	0.00	0.00	14,000.00
2016	50	0.00	0.00	0.00	0.00	6,500.00
2017	1	0.00	0.00	0.00	600.00	0.00
2017	5	0.00	0.00	450.00	0.00	0.00
2017	9	0.00	0.00	0.00	0.00	1,000.00
2017	10	0.00	0.00	0.00	0.00	7,000.00
2017	13	0.00	0.00	0.00	750.00	72,150.00
2017	15	0.00	0.00	0.00	500.00	0.00
2017	17	0.00	200.00	0.00	0.00	0.00
2017	42	0.00	0.00	0.00	0.00	1,000.00
2017	46	0.00	0.00	0.00	0.00	1,000.00
2017	50	0.00	0.00	0.00	0.00	11,000.00
2017	53	0.00	0.00	0.00	800.00	0.00
2018	2	50.00	0.00	0.00	0.00	5,000.00
2018	3	0.00	0.00	0.00	500.00	1,000.00
		508.00	5,774.00	7,566.00	31,462.00	697,559.23

Report Menu Name

Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by fiscal year for donations in five dollar ranges.

02/12/2018 **Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year** Page 1

All Donations

Year	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
1997	50.00	100.00	0.00	0.00	0.00
1998	0.00	200.00	0.00	0.00	0.00
1999	50.00	100.00	400.00	0.00	0.00
2000	0.00	0.00	0.00	600.00	0.00
2001	0.00	200.00	400.00	750.00	0.00
2002	0.00	0.00	0.00	600.00	1,000.00
2003	10.00	0.00	0.00	750.00	9,000.00
2004	0.00	0.00	0.00	0.00	11,500.00
2005	0.00	0.00	0.00	0.00	6,500.00
2006	50.00	0.00	0.00	0.00	10,000.00
2007	0.00	100.00	0.00	1,400.00	15,000.00
2008	50.00	200.00	0.00	500.00	15,000.00
2009	0.00	100.00	400.00	500.00	18,200.00
2010	0.00	200.00	0.00	600.00	26,500.00
2011	0.00	200.00	1,100.00	2,450.00	9,000.00
2012	0.00	422.00	400.00	2,600.00	43,234.56
2013	188.00	1,752.00	1,450.00	7,687.00	88,474.67
2014	60.00	800.00	2,966.00	8,175.00	25,000.00
2015	0.00	600.00	0.00	1,200.00	99,500.00
2016	0.00	600.00	0.00	500.00	93,000.00
2017	0.00	200.00	450.00	1,850.00	207,650.00
2018	50.00	0.00	0.00	1,300.00	19,000.00
	508.00	5,774.00	7,566.00	31,462.00	697,559.23

Report Menu Name

Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year And Week

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total revenue by fiscal year and week for donations in five dollar ranges.

02/12/2018 Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year And Week Page 5

All Donations

Year	Week	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
2016	11	0.00	100.00	0.00	0.00	0.00
2016	13	0.00	0.00	0.00	0.00	7,500.00
2016	14	0.00	0.00	0.00	0.00	70,000.00
2016	15	0.00	100.00	0.00	0.00	0.00
2016	19	0.00	100.00	0.00	0.00	0.00
2016	24	0.00	0.00	0.00	0.00	5,000.00
2016	30	0.00	0.00	0.00	0.00	2,500.00
2016	35	0.00	0.00	0.00	500.00	0.00
2016	40	0.00	0.00	0.00	0.00	6,000.00
2016	46	0.00	100.00	0.00	0.00	0.00
2017	18	0.00	0.00	0.00	0.00	8,000.00
2017	19	0.00	0.00	0.00	0.00	94,000.00
2017	21	0.00	0.00	0.00	0.00	5,000.00
2017	22	0.00	0.00	0.00	0.00	14,000.00
2017	24	0.00	0.00	0.00	0.00	6,500.00
2017	28	0.00	0.00	0.00	600.00	0.00
2017	32	0.00	0.00	450.00	0.00	0.00
2017	36	0.00	0.00	0.00	0.00	1,000.00
2017	37	0.00	0.00	0.00	0.00	7,000.00
2017	40	0.00	0.00	0.00	750.00	72,150.00
2017	42	0.00	0.00	0.00	500.00	0.00
2017	44	0.00	200.00	0.00	0.00	0.00
2018	17	0.00	0.00	0.00	0.00	1,000.00
2018	21	0.00	0.00	0.00	0.00	1,000.00
2018	25	0.00	0.00	0.00	0.00	11,000.00
2018	28	0.00	0.00	0.00	800.00	0.00
2018	29	50.00	0.00	0.00	0.00	5,000.00
2018	30	0.00	0.00	0.00	500.00	1,000.00
		508.00	5,774.00	7,566.00	31,462.00	697,559.23

Report Menu Name

Donations - Donation Detail Report

Description

Designed to be used with a Donation-based Selection Result, this report layout will group and subtotal donations by constituent. It is one of the most often used donation reports in DonorQuest.

02/12/2018 **Donations - Donation Detail Report** Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY	Comment
6	1984 Productions	02/08/2014	400.00	CK	123-60-932	14AC	1000		T1	
		01/08/2014	350.00	CK	123-60-932	14AC	1000		T1	
		12/11/2013	300.00	CK	123-60-932	13AC	1000		T1	
		11/10/2013	250.00	CK	123-60-932	13AC	1000		T1	
		04/20/2011	700.00	CK	123-45-456	11AC	1000	APPEAL1	T1	
			2,000.00							
28	Bach Memorial Account	04/15/2017	500.00	CA	123-50-937	17AC	2000	APPEAL1	T1	
		02/04/2013	250.00	CA	123-45-456	13AC	1000	AM1	T1	
		01/04/2013	500.00	CA	123-45-456	13AC	1000	AM1	T1	
			1,250.00							
15	Baker, Thomas	03/31/2017	750.00	CA	123-45-678	17AC	3000	APPEAL1	T1	
		05/10/2016	100.00	CK	123-50-937	16AC	1000		T1	
		01/22/2016	2,500.00	CK	123-45-456	UNSOL	1000		T1	
		11/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		10/06/2015	100.00	CK	123-60-932	15AC	1000		T1	
		09/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		08/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		07/07/2015	100.00	CK	123-50-937	15AC	1000		T1	
		06/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		05/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		03/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		02/04/2015	100.00	CK	123-50-937	15AC	1000		T1	
		01/22/2015	1,000.00	CK	123-45-456	UNSOL	1000		T1	
		01/04/2015	100.00	CK	123-50-937	15AC	1000		T1	
		12/07/2014	100.00	CK	123-50-937	14AC	1000		T1	
		01/22/2014	1,000.00	CK	123-45-456	UNSOL	1000		T1	
		01/22/2013	750.00	CK	123-45-456	UNSOL	1000		T1	
		04/22/2012	500.00	AE	123-45-456	12AC	1000	APPEAL2	T1	
		01/22/2012	600.00	CK	123-45-456	UNSOL	1000		T1	
		09/30/2011	200.00	AE	12345678901234567890	11AC	1000	APPEAL2	T1	
		05/27/2011	300.00	AE	123-45-456	11AC	1000	APPEAL2	T1	
		01/22/2011	400.00	CK	123-45-456	UNSOL	1000		T1	
		11/20/2010	2,000.00	CK	123-45-456	10AC	1000	APPEAL1	T1	
		01/22/2010	200.00	CK	123-45-456	UNSOL	1000		T1	
		02/19/2009	5,000.00	CA	123-45-456	09AC	1000	APPEAL1	T1	
		01/22/2009	100.00	CK	123-45-456	UNSOL	1000		T1	
		01/22/2008	50.00	CK	123-45-456	UNSOL	1000		T1	
		01/25/2007	5,000.00	CK	123-45-456	UNSOL	1000		T1	
			21,550.00							
18	Bowie, Denise	03/31/2017	8,450.00	CK	123-60-932	17AC	3000	APPEAL1	T1	
		03/09/2015	500.00	CK	123-60-932	15AC	3000		T1	
		01/05/2015	5,000.00	CA	123-70-MEM	UNSOL	5000		TC	
		04/06/2013	4,500.00	CK	123-50-937	BRKFST	3000		T2	
		03/23/2013	2,500.00	VC	123-70-MEM	UNSOL	5000		TC	CC# 1234 234 134 3453
			20,950.00							

Report Menu Name

Donations - Donation Detail Report - Ordered By Donation Date

Description

Designed to be used with a Donation-based Selection Result, this report layout will show all donations in chronological order, independent of the donor account they belong to.

02/12/2018 | Donations - Donation Detail Report - Ordered By Donation Date | Page 5

All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY	Comment
15	Baker, Thomas	05/10/2016	100.00	CK	123-50-937	16AC	1000		T1	
12	Hayward, Justin	10/26/2016	8,000.00	CA	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S. Division)	11/01/2016	25,000.00	AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
29	Northern Songs Limited, (U.S. Division)									
29	Northern Songs Limited, (U.S. Division)	11/02/2016	45,000.00	AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
		11/03/2016	24,000.00	AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
32	Intrepid Systems Inc.	11/15/2016	5,000.00	CA	123-45-456	16AC	1000	AM1	T1	
29	Northern Songs Limited, (U.S. Division)	11/20/2016	14,000.00	AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
53	Musk, Elon	12/10/2016	6,500.00	CK	123-45-456	ACC	1000	APPEAL1	T1	
7	Schmidt Aeronautic Foundation	01/05/2017	600.00	CK	123-60-932	UNSOL	1000		T1	
17	Foster, James	01/30/2017	450.00	CK	123-60-932	17AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	03/04/2017	1,000.00	CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
53	Musk, Elon	03/10/2017	7,000.00	CK	123-45-456	17AC	1000	APPEAL1	T1	
12	Hayward, Justin	03/26/2017	9,700.00	CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.
10	Waters, Roger	03/31/2017	4,000.00	CK	123-45-456	17AC	1000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00	CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00	CK	123-60-932	17AC	3000	APPEAL1	T1	
27	The Corporation For Public Broadcastin	03/31/2017	50,000.00	CK	123-60-932	17AC	1000	APPEAL1	T2	
28	Bach Memorial Account	04/15/2017	500.00	CA	123-50-937	17AC	2000	APPEAL1	T1	
32	Intrepid Systems Inc.	04/25/2017	100.00	CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.	04/25/2017	100.00	CK	123-45-456	17AC	1000	APPEAL1	BASI	General comment goes here
53	Musk, Elon	10/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	11/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	12/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	12/15/2017	10,000.00	CK	123-45-456	ACC	1000	APPEAL1	T1	
20	Burke, James	12/31/2017	800.00	VC	123-60-932	17AC	1000		T1	
11	Decca Records	01/07/2018	50.00							
53	Musk, Elon	01/10/2018	5,000.00	CK	123-45-456	18AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	01/15/2018	500.00	CK	123-45-456	18AC	1000	APPEAL1	T1	
53	Musk, Elon	01/15/2018	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
			742,869.23							

Report Menu Name

Donations - Donation Detail Report - Totals Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will simply show totals by the donor account they belong to.

02/12/2018 **Donations - Donation Detail Report - Totals Only** **Page 1**

All Donations

ID Num	Giving Entity	Amount	TY Value
6	1984 Productions	2,000.00	0.00
28	Bach Memorial Account	1,250.00	0.00
15	Baker, Thomas	21,550.00	0.00
18	Bowie, Denise	20,950.00	0.00
20	Burke, James	24,014.00	0.00
11	Decca Records	850.00	0.00
17	Foster, James	1,625.00	0.00
4	Gore, Martin L.	2,160.00	0.00
12	Hayward, Justin	94,010.00	0.00
24	IBM Corporation	14,814.23	0.00
32	Intrepid Systems Inc.	33,100.00	0.00
21	Knight, Paula	11,800.00	0.00
13	Lennon, John	17,000.00	0.00
23	Lodge, John	13,500.00	0.00
5	Mozart Memorial Account	500.00	0.00
53	Musk, Elon	48,000.00	0.00
29	Northern Songs Limited, (U.S. Division)	343,500.00	0.00
2	Progressive Music, Inc.	2,896.00	0.00
7	Schmidt Aeronautic Foundation	6,700.00	0.00
8	Scott, Montgomery	1,000.00	0.00
26	Smith, John	200.00	0.00
27	The Corporation For Public Broadcasting	50,000.00	0.00
3	Trek Foundation	11,200.00	0.00
10	Waters, Roger	20,250.00	0.00
		742,869.23	0.00

Report Menu Name

Donations - Donation Detail Report For Soft Credit Monetary Donations Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will group soft credit donations by the soft credit recipients they have been credited to. A subtotal is shown for each soft credit recipient. The report will automatically omit donations which have no soft credit assignment, even if they are in the selection result you use with the report.

02/12/2018 Donations - Donation Detail Report For Soft Credit Monetary Donations Only Page 4
Ordered By Soft Credit Recipient and Donation Date

Organization	Name	Address	City / State / Zip	Date	Amount	Count	Type	Stimulus	Fund	Appeal
*** For: Mozart, Wolfgang										
	Waters, Roger	1234 Beyond The Wall	San Mateo, CA 94403	11/24/2014	10,000.00		CA	UNSOL	5000	
Threshold Records	Lodge, John	71828 One Way	Yuba City, CA 95991-3171	11/24/2014	7,500.00		VC	UNSOL	5000	
					17,500.00	2				

...

02/12/2018 Donations - Donation Detail Report For Soft Credit Monetary Donations Only Page 5
Ordered By Soft Credit Recipient and Donation Date

Organization	Name	Address	City / State / Zip	Date	Amount	Count	Type	Stimulus	Fund	Appeal
*** For: Musk, Elon										
Intrepid Systems Inc.	Anderson, Brad	701 Galer St.	Seattle, WA 98109	03/04/2017	1,000.00		CA	17AC	1000	APPEAL1
					1,000.00	1				
					43,195.67	9				

Report Menu Name

Donations - Donation Detail Report Including Alternate Unit Donations

Description

Designed to be used with a Donation-based Selection Result, this report layout will show Alternate Unit donations, grouped and subtotaled by the donor accounts they belong to. Alternate unit donations are donation of non-monetary type, like hours of time, pounds of food donated, etc. Since it would make no sense to mix together donations of hours, food, money, etc. (especially when totalling the amounts), it is important that the selection you use with the report contain only donations of a single type. The sample report below shows only donations of time.

03/01/2018 — Donations - Donation Detail Report Including Alternate Unit Donations — Page 1

Donations of Time

ID Num	Giving Entity	Date	Amount	Count	Type	Account	Stimulus	Fund	Appeal	TY Code	TY Value	Comment
15	Baker, Thomas	10/20/2011	20.00		HR	123-45-456	11AC	1000	APPEAL2	T1	0.00	
			20.00	1								
21	Knight, Paula	10/06/2013	8.00		HR		VOL	1000			0.00	Volunteered 8 hours with Christmas dinner setup.
			8.00	1								
26	Smith, John	11/22/2014	8.00		HR		VOL	1000		TC	0.00	Volunteered 8 hrs.
			8.00	1								
			36.00	3								

Report Menu Name

Donations - Donation Detail Report Including Alternate Unit Donations - Totals Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will show Alternate Unit donations, grouped and subtotaled by the donor accounts they belong to. Only a total and count are shown for each donor, along with a grand total. Alternate unit donations are donation of non-monetary type, like hours of time, pounds of food donated, etc. Since it would make no sense to mix together donations of hours, food, money, etc. (especially when totalling the amounts), it is important that the selection you use with the report contain only donations of a single type. The sample report below shows only donations of time.

03/01/2018 **Donations - Donation Detail Report Including Alternate Unit Donations - Totals Only** **Page 1**

Donations of Time

ID Num	Giving Entity	Amount	Count	TY Value
15	Baker, Thomas	20.00	1	0.00
21	Knight, Paula	8.00	1	0.00
26	Smith, John	8.00	1	0.00
		36.00	3	0.00

Report Menu Name

Donations - Donation Detail Report With Addresses

Description

Designed to be used with a Donation-based Selection Result, this report layout will group and subtotal donations by donor, showing the full mailing address and email address of each donor in a vertical mailing label-style format.

02/12/2018 | **Donations - Donation Detail Report With Addresses** | **Page 1**

All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY	Comment
6	Patrick McGoohan	02/08/2014	400.00	CK	123-60-932	14AC	1000		T1	
	1984 Productions	01/08/2014	350.00	CK	123-60-932	14AC	1000		T1	
	1984 In The Village	12/11/2013	300.00	CK	123-60-932	13AC	1000		T1	
	Oceania, CA 95070-3212	11/10/2013	250.00	CK	123-60-932	13AC	1000		T1	
	Patrick@donorquest.com	04/20/2011	700.00	CK	123-45-456	11AC	1000	APPEAL1	T1	
			2,000.00							
28	Johann Bach	04/15/2017	500.00	CA	123-50-937	17AC	2000	APPEAL1	T1	
	Bach Memorial Account	02/04/2013	250.00	CA	123-45-456	13AC	1000	AM1	T1	
	3543 Brandenburg Way	01/04/2013	500.00	CA	123-45-456	13AC	1000	AM1	T1	
	Seattle, WA 98109									
	Johann@donorquest.com		1,250.00							
15	Thomas Baker	03/31/2017	750.00	CA	123-45-678	17AC	3000	APPEAL1	T1	
	4968 Tardis Ave.	05/10/2016	100.00	CK	123-50-937	16AC	1000		T1	
	San Jose, CA 95112-3211	01/22/2016	2,500.00	CK	123-45-456	UNSOL	1000		T1	
	Thomas@donorquest.com	11/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		10/06/2015	100.00	CK	123-60-932	15AC	1000		T1	
		09/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		08/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		07/07/2015	100.00	CK	123-50-937	15AC	1000		T1	
		06/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		05/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		03/06/2015	100.00	CK	123-50-937	15AC	1000		T1	
		02/04/2015	100.00	CK	123-50-937	15AC	1000		T1	
		01/22/2015	1,000.00	CK	123-45-456	UNSOL	1000		T1	
		01/04/2015	100.00	CK	123-50-937	15AC	1000		T1	
		12/07/2014	100.00	CK	123-50-937	14AC	1000		T1	
		01/22/2014	1,000.00	CK	123-45-456	UNSOL	1000		T1	
		01/22/2013	750.00	CK	123-45-456	UNSOL	1000		T1	
		04/22/2012	500.00	AE	123-45-456	12AC	1000	APPEAL2	T1	
		01/22/2012	600.00	CK	123-45-456	UNSOL	1000		T1	
		09/30/2011	200.00	AE	12345678901234567890	11AC	1000	APPEAL2	T1	
		05/27/2011	300.00	AE	123-45-456	11AC	1000	APPEAL2	T1	
		01/22/2011	400.00	CK	123-45-456	UNSOL	1000		T1	
		11/20/2010	2,000.00	CK	123-45-456	10AC	1000	APPEAL1	T1	
		01/22/2010	200.00	CK	123-45-456	UNSOL	1000		T1	
		02/19/2009	5,000.00	CA	123-45-456	09AC	1000	APPEAL1	T1	
		01/22/2009	100.00	CK	123-45-456	UNSOL	1000		T1	
		01/22/2008	50.00	CK	123-45-456	UNSOL	1000		T1	
		01/25/2007	5,000.00	CK	123-45-456	UNSOL	1000		T1	
			21,550.00							

02/12/2018 | **Donations - Donation Detail Report With Addresses** | **Page 9**

All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY	Comment
10	Roger Waters	03/31/2017	4,000.00	CK	123-45-456	17AC	1000	APPEAL1	T1	
	1234 Beyond The Wall Way	11/24/2014	10,000.00	CA	123-50-937	UNSOL	5000		TC	Given in Honor of Mozart on his birthday.
	San Mateo, CA 94403									
	Roger@donorquest.com	03/27/2013	4,000.00	CA	123-45-456	13AC	1000	APPEAL1	T1	
		01/11/2013	750.00	VC	123-60-932	MUSIC	1000		T1	
		02/05/2012	750.00	AE	123-45-456	12AC	1000		T1	
		01/05/2012	750.00	AE	123-45-456	MUSIC	1000		T1	
			20,250.00							
			742,869.23							

Report Menu Name

Donations - Donation Detail Report With Addresses - Totals Only

Description

Designed to be used with a Donation-based Selection Result, this is a variation on the, "Donations - Donation Detail Report With Addresses" report layout which shows the full mailing address of each donor, but only their donation total for all the donations in the selection result you print the report from.

02/12/2018 — **Donations - Donation Detail Report With Addresses - Totals Only** — **All Donations** — Page 1

ID Num	Last Name	Giving Entity	Amount
6	McGoohan	Patrick McGoohan 1984 Productions 1984 In The Village Oceania, CA 95070-3212	2,000.00
28	Bach	Johann Bach Bach Memorial Account 3543 Brandenburg Way Seattle, WA 98109	1,250.00
15	Baker	Thomas Baker 4968 Tardis Ave. San Jose, CA 95112-3211	21,550.00
18	Bowie	Denise Bowie 123 First Avenue Apt 200 San Jose, CA 95119-2312	20,950.00
20	Burke	James Burke 826 Connections Way Palo Alto, CA 94304-7899	24,014.00
11	Davidson	Peter Davidson Decca Records 3775 Galafrey Way Palo Alto, CA 94300-2112	850.00
17	Foster	James Foster 14552 Medical Dr. Saratoga, CA 95070-3212	1,625.00
4	Gore	Martin L. Gore Stanford OPA Bldg. Eugene, OR 97401	2,160.00
12	Hayward	Justin Hayward Threshold Records 1701 Enterprise Way Seattle, WA 98109	94,010.00
24	Harrison	Timothy Harrison IBM Corporation 486 Intel Way. San Jose, CA 95131-1234	14,814.23
32	Anderson	Brad Anderson Intrepid Systems Inc. 701 Galer St. Seattle, WA 98109	33,100.00

Report Menu Name

Donations - Donation Detail Report With Addresses Including Alternate Unit Donations

Description

Designed to be used with a Donation-based Selection Result, this report layout will show Alternate Unit donations, grouped and subtotaled by the donor accounts they belong to. Full donation detail is shown in addition to subtotals by donor.

02/12/2018 — Donations - Donation Detail Report With Addresses — Volunteer Hours — Page 1

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY	Comment
15	Thomas Baker 4968 Tardis Ave. San Jose, CA 95112-3211 Thomas@donorquest.com	10/20/2011	20.00	HR	123-45-456	11AC	1000	APPEAL2	T1	
			20.00							
21	Paula Knight 1410 Holly Ave. San Jose, CA 95133-4333 Paula@donorquest.com	10/06/2013	8.00	HR		VOL	1000			Volunteered 8 hours with Christmas dinner setup.
			8.00							
26	John Smith 4321 Another Smith Way San Mateo, CA 94403 John@donorquest.com	11/22/2014	8.00	HR		VOL	1000		TC	Volunteered 8 hrs.
			8.00							
			36.00							

Report Menu Name

Donations - Donation Detail Report With Addresses Including Alternate Unit Donations - Totals Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will show Alternate Unit donations, grouped and subtotaled by the donor accounts they belong to. Only subtotals are shown for each donor.

02/12/2018 **Donations - Donation Detail Report With Addresses Including Alternate Unit Donations - Totals Only** Page 1

Volunteer Hours

ID Num	Last Name	Giving Entity	Amount
15	Baker	Thomas Baker 4968 Tardis Ave. San Jose, CA 95112-3211	20.00
21	Knight	Paula Knight 1410 Holly Ave. San Jose, CA 95133-4333	8.00
26	Smith	John Smith 4321 Another Smith Way San Mateo, CA 94403	8.00
			36.00

Report Menu Name

Donations - Donation Detail Report With Totals And Counts By Donor

Description

Designed to be used with a Donation-based Selection Result, this is a variation on the basic, "Donations - Donation Detail Report" which includes a count of the number of donations being reported on for each donor.

02/12/2018 **Donations - Donation Detail Report With Totals And Counts By Donor** Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Count	Type	Account	Stimulus	Fund	Appeal	Comment
6	1984 Productions	02/08/2014	400.00		CK	123-60-932	14AC	1000		
		01/08/2014	350.00		CK	123-60-932	14AC	1000		
		12/11/2013	300.00		CK	123-60-932	13AC	1000		
		11/10/2013	250.00		CK	123-60-932	13AC	1000		
		04/20/2011	700.00		CK	123-45-456	11AC	1000	APPEAL1	
			2,000.00	5						
28	Bach Memorial Account	04/15/2017	500.00		CA	123-50-937	17AC	2000	APPEAL1	
		02/04/2013	250.00		CA	123-45-456	13AC	1000	AM1	
		01/04/2013	500.00		CA	123-45-456	13AC	1000	AM1	
			1,250.00	3						
15	Baker, Thomas	03/31/2017	750.00		CA	123-45-678	17AC	3000	APPEAL1	
		05/10/2016	100.00		CK	123-50-937	16AC	1000		
		01/22/2016	2,500.00		CK	123-45-456	UNSOL	1000		
		11/06/2015	100.00		CK	123-50-937	15AC	1000		
		10/06/2015	100.00		CK	123-60-932	15AC	1000		
		09/06/2015	100.00		CK	123-50-937	15AC	1000		
		08/06/2015	100.00		CK	123-50-937	15AC	1000		
		07/07/2015	100.00		CK	123-50-937	15AC	1000		
		06/06/2015	100.00		CK	123-50-937	15AC	1000		
		05/06/2015	100.00		CK	123-50-937	15AC	1000		
		03/06/2015	100.00		CK	123-50-937	15AC	1000		
		02/04/2015	100.00		CK	123-50-937	15AC	1000		
		01/22/2015	1,000.00		CK	123-45-456	UNSOL	1000		
		01/04/2015	100.00		CK	123-50-937	15AC	1000		
		12/07/2014	100.00		CK	123-50-937	14AC	1000		
		01/22/2014	1,000.00		CK	123-45-456	UNSOL	1000		
		01/22/2013	750.00		CK	123-45-456	UNSOL	1000		
		04/22/2012	500.00		AE	123-45-456	12AC	1000	APPEAL2	
		01/22/2012	600.00		CK	123-45-456	UNSOL	1000		
		09/30/2011	200.00		AE	12345678901234567890	11AC	1000	APPEAL2	
		05/27/2011	300.00		AE	123-45-456	11AC	1000	APPEAL2	
		01/22/2011	400.00		CK	123-45-456	UNSOL	1000		
		11/20/2010	2,000.00		CK	123-45-456	10AC	1000	APPEAL1	
		01/22/2010	200.00		CK	123-45-456	UNSOL	1000		
		02/19/2009	5,000.00		CA	123-45-456	09AC	1000	APPEAL1	
		01/22/2009	100.00		CK	123-45-456	UNSOL	1000		
		01/22/2008	50.00		CK	123-45-456	UNSOL	1000		
		01/25/2007	5,000.00		CK	123-45-456	UNSOL	1000		
			21,550.00	28						
18	Bowie, Denise	03/31/2017	8,450.00		CK	123-60-932	17AC	3000	APPEAL1	
		03/09/2015	500.00		CK	123-60-932	15AC	3000		
		01/05/2015	5,000.00		CA	123-70-MEM	UNSOL	5000		
		04/06/2013	4,500.00		CK	123-50-937	BRKFST	3000		
		03/23/2013	2,500.00		VC	123-70-MEM	UNSOL	5000		CC# 1234 234 134 3453
			20,950.00	5						

Report Menu Name

Donations - Donation Detail Report, Subtotals by Calendar Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show subtotals by calendar year for each donor, a subtotal by donor, and a grand total of all donations selected for reporting on the last page.

02/12/2018 Donations - Donation Detail Report - Subtotals By Calendar Year Page 1
All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY Code	TY Value	Comment
6	1984 Productions	02/08/2014	400.00	CK	123-60-932	14AC	1000		T1	0.00	
		01/08/2014	350.00	CK	123-60-932	14AC	1000		T1	0.00	
			750.00								
		12/11/2013	300.00	CK	123-60-932	13AC	1000		T1	0.00	
		11/10/2013	250.00	CK	123-60-932	13AC	1000		T1	0.00	
			550.00								
		04/20/2011	700.00	CK	123-45-456	11AC	1000	APPEAL1	T1	0.00	
			700.00								
			2,000.00								
28	Bach Memorial Account	04/15/2017	500.00	CA	123-50-937	17AC	2000	APPEAL1	T1	0.00	
			500.00								
		02/04/2013	250.00	CA	123-45-456	13AC	1000	AM1	T1	0.00	
		01/04/2013	500.00	CA	123-45-456	13AC	1000	AM1	T1	0.00	
			750.00								
			1,250.00								
15	Baker, Thomas	03/31/2017	750.00	CA	123-45-678	17AC	3000	APPEAL1	T1	0.00	
			750.00								
		05/10/2016	100.00	CK	123-50-937	16AC	1000		T1	0.00	
		01/22/2016	2,500.00	CK	123-45-456	UNSOL	1000		T1	0.00	
			2,600.00								

02/12/2018 Donations - Donation Detail Report - Subtotals By Calendar Year Page 15
All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY Code	TY Value	Comment
10	Waters, Roger	03/31/2017	4,000.00	CK	123-45-456	17AC	1000	APPEAL1	T1	0.00	
			4,000.00								
		11/24/2014	10,000.00	CA	123-50-937	UNSOL	5000		TC	0.00	Given in Honor of Mozart on his birthday.
			10,000.00								
		03/27/2013	4,000.00	CA	123-45-456	13AC	1000	APPEAL1	T1	0.00	
		01/11/2013	750.00	VC	123-60-932	MUSIC	1000		T1	0.00	
			4,750.00								
		02/05/2012	750.00	AE	123-45-456	12AC	1000		T1	0.00	
		01/05/2012	750.00	AE	123-45-456	MUSIC	1000		T1	0.00	
			20,250.00								
			742,869.23								

Report Menu Name

Donations - Donation Summary Report

Description

Designed to be used with a Donation-based Selection Result, this report layout will show a total and donation count for each donor.

02/12/2018 **Donations - Donation Summary Report** Page 1

All Donations

ID Num	Giving Entity	Amount	Count
6	1984 Productions	2,000.00	5
28	Bach Memorial Account	1,250.00	3
15	Baker, Thomas	21,550.00	28
18	Bowie, Denise	20,950.00	5
20	Burke, James	24,014.00	29
11	Decca Records	850.00	6
17	Foster, James	1,625.00	6
4	Gore, Martin L.	2,160.00	6
12	Hayward, Justin	94,010.00	38
24	IBM Corporation	14,814.23	3
32	Intrepid Systems Inc.	33,100.00	25
21	Knight, Paula	11,800.00	12
13	Lennon, John	17,000.00	2
23	Lodge, John	13,500.00	4
5	Mozart Memorial Account	500.00	1
53	Musk, Elon	48,000.00	11
29	Northern Songs Limited, (U.S. Division)	343,500.00	12
2	Progressive Music, Inc.	2,896.00	6
7	Schmidt Aeronautic Foundation	6,700.00	5
8	Scott, Montgomery	1,000.00	1
26	Smith, John	200.00	1
27	The Corporation For Public Broadcasting	50,000.00	1
3	Trek Foundation	11,200.00	5
10	Waters, Roger	20,250.00	6
		742,869.23	221

Report Menu Name

Donations - Donor Name, Phone, Donation Amount And Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail, a subtotal for each donor, and the main contact number for each donor.

02/12/2018 **Donations - Donor Name, Phone, Donation Amount And Stimulus** Page 1

All Donations

Giving Entity	Phone	Date	Amount	Stimulus
1984 Productions		02/08/2014	400.00	2014 Annual Campaign
		01/08/2014	350.00	2014 Annual Campaign
		12/11/2013	300.00	2013 Annual Campaign
		11/10/2013	250.00	2013 Annual Campaign
		04/20/2011	700.00	2011 Annual Campaign
			2,000.00	
Bach Memorial Account	(206) 270-1050	04/15/2017	500.00	2017 Annual Campaign
		02/04/2013	250.00	2013 Annual Campaign
		01/04/2013	500.00	2013 Annual Campaign
			1,250.00	
Baker, Thomas	(510) 356-7540	03/31/2017	750.00	2017 Annual Campaign
		05/10/2016	100.00	2016 Annual Campaign
		01/22/2016	2,500.00	Unsolicited
		11/06/2015	100.00	2015 Annual Campaign
		10/06/2015	100.00	2015 Annual Campaign
		09/06/2015	100.00	2015 Annual Campaign
		08/06/2015	100.00	2015 Annual Campaign
		07/07/2015	100.00	2015 Annual Campaign
		06/06/2015	100.00	2015 Annual Campaign
		05/06/2015	100.00	2015 Annual Campaign
		03/06/2015	100.00	2015 Annual Campaign
		02/04/2015	100.00	2015 Annual Campaign
		01/22/2015	1,000.00	Unsolicited
		01/04/2015	100.00	2015 Annual Campaign
		12/07/2014	100.00	2014 Annual Campaign
		01/22/2014	1,000.00	Unsolicited
		01/22/2013	750.00	Unsolicited
		04/22/2012	500.00	2012 Annual Campaign
		01/22/2012	600.00	Unsolicited
		09/30/2011	200.00	2011 Annual Campaign
		05/27/2011	300.00	2011 Annual Campaign
		01/22/2011	400.00	Unsolicited
		11/20/2010	2,000.00	2010 Annual Campaign
		01/22/2010	200.00	Unsolicited
		02/19/2009	5,000.00	2009 Annual Campaign
		01/22/2009	100.00	Unsolicited
		01/22/2008	50.00	Unsolicited
		01/25/2007	5,000.00	Unsolicited
			21,550.00	
Bowie, Denise	(408) 555-1212	03/31/2017	8,450.00	2017 Annual Campaign
		03/09/2015	500.00	2015 Annual Campaign
		01/05/2015	5,000.00	Unsolicited
		04/06/2013	4,500.00	Breakfast Special Event
		03/23/2013	2,500.00	Unsolicited
			20,950.00	

Report Menu Name

Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Current Cal Year's Total

Description

This is a variation of the, "Donations - Donor Name, Phone, Donation Amount And Stimulus" which includes total giving for the current calendar year.

02/12/2018 **Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Current Cal Year's Total** Page 1

All Donations

Giving Entity	Phone	Date	Amount	Stimulus	2018
Musk, Elon		01/15/2018	1,000.00	Science Endowment	6,000.00
		01/10/2018	5,000.00	2018 Annual Campaign	
		12/15/2017	1,000.00	Science Endowment	
		12/15/2017	10,000.00	Annual Christmas Campaign	
		11/15/2017	1,000.00	Science Endowment	
		10/15/2017	1,000.00	Science Endowment	
		03/10/2017	7,000.00	2017 Annual Campaign	
		12/10/2016	6,500.00	Annual Christmas Campaign	
		03/29/2016	6,000.00	2016 Annual Campaign	
		12/08/2015	5,000.00	Annual Christmas Campaign	
		03/15/2015	4,500.00	2015 Annual Campaign	
			48,000.00		
Intrepid Systems Inc.	(800) 555-1212	01/15/2018	500.00	2018 Annual Campaign	500.00
		04/25/2017	100.00	2017 Annual Campaign	
		04/25/2017	100.00	2017 Annual Campaign	
		03/04/2017	1,000.00	2017 Annual Campaign	
		11/15/2016	5,000.00	2016 Annual Campaign	
		08/31/2015	2,000.00	2015 Annual Campaign	
		05/29/2014	1,000.00	2014 Annual Campaign	
		02/19/2013	1,400.00	2013 Annual Campaign	
		08/26/2012	3,000.00	2012 Annual Campaign	
		05/12/2011	2,000.00	2011 Annual Campaign	
		02/18/2011	1,500.00	2011 Annual Campaign	
		01/25/2011	1,500.00	2011 Annual Campaign	
		03/26/2010	4,000.00	2010 Annual Campaign	
		11/17/2009	2,500.00	2009 Annual Campaign	
		12/02/2008	1,500.00	2008 Annual Campaign	
		02/20/2007	900.00	2007 Annual Campaign	
		12/23/2006	500.00	2006 Annual Campaign	
		01/24/2005	1,500.00	2005 Annual Campaign	
		01/25/2004	1,000.00	2004 Annual Campaign	
		01/25/2003	750.00	2003 Annual Campaign	
		01/24/2002	600.00	Music Festival	
		02/28/2001	200.00	2001 Annual Campaign	
		01/24/2001	400.00	Music Festival	
		02/28/1999	50.00	Music Festival	
		01/25/1999	100.00	Music Festival	
			33,100.00		
Decca Records	(415) 555-1212	01/07/2018	50.00		50.00
		10/24/2013	200.00	Unsolicited	
		12/09/2012	150.00	2012 Annual Campaign	
		11/08/2012	150.00	2012 Annual Campaign	
		10/07/2012	150.00	2012 Annual Campaign	
		09/06/2012	150.00	2012 Annual Campaign	
			850.00		

Report Menu Name

Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Prev Cal Year's Total Giving

Description

This is a variation of the, "Donations - Donor Name, Phone, Donation Amount And Stimulus" which includes total giving for the previous calendar year.

02/12/2018 | Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Prev Cal Year's Total Giving | Page 2

All Donations

Giving Entity	Phone	Date	Amount	Stimulus	2017
Hayward, Justin	(425) 555-1212	03/26/2017	9,700.00	2017 Annual Campaign	9,700.00
		10/26/2016	8,000.00	2016 Annual Campaign	
		09/26/2015	7,500.00	2015 Annual Campaign	
		08/19/2014	6,500.00	2014 Annual Campaign	
		07/05/2013	6,000.00	2013 Annual Campaign	
		02/20/2012	5,000.00	2012 Annual Campaign	
		12/19/2011	1,000.00	2011 Annual Campaign	
		11/20/2010	1,000.00	2010 Annual Campaign	
		05/15/2009	9,700.00	2009 Annual Campaign	
		12/26/2008	2,000.00	2008 Annual Campaign	
		03/26/2007	10,000.00	2007 Annual Campaign	
		01/25/2005	5,000.00	Unsolicited	
		01/30/2004	1,000.00	2004 Annual Campaign	
		01/25/2004	2,500.00	Unsolicited	
		01/01/2004	1,000.00	2004 Annual Campaign	
		12/02/2003	1,000.00	2003 Annual Campaign	
		11/05/2003	1,000.00	2003 Annual Campaign	
		10/03/2003	1,000.00	2003 Annual Campaign	
		09/16/2003	1,000.00	2003 Annual Campaign	
		08/01/2003	1,000.00	2003 Annual Campaign	
		07/02/2003	1,000.00	2003 Annual Campaign	
		06/01/2003	1,000.00	2003 Annual Campaign	
		05/01/2003	1,000.00	2003 Annual Campaign	
		04/06/2003	1,000.00	2003 Annual Campaign	
		03/04/2003	1,000.00	2003 Annual Campaign	
		01/31/2003	1,000.00	2003 Annual Campaign	
		01/25/2003	1,000.00	Unsolicited	
		12/30/2002	1,000.00	2002 Annual Campaign	
		12/02/2002	1,000.00	2002 Annual Campaign	
		11/04/2002	10.00	2002 Annual Campaign	
		10/03/2002	1,000.00	2002 Annual Campaign	
		01/25/2002	1,000.00	Unsolicited	
		01/25/2001	750.00	Unsolicited	
		01/25/2000	600.00	Unsolicited	
		01/25/1999	400.00	Unsolicited	
		01/25/1998	200.00	Unsolicited	
		02/28/1997	50.00	Unsolicited	
		01/25/1997	100.00	Unsolicited	
			94,010.00		
Bowie, Denise	(408) 555-1212	03/31/2017	8,450.00	2017 Annual Campaign	8,450.00
		03/09/2015	500.00	2015 Annual Campaign	
		01/05/2015	5,000.00	Unsolicited	
		04/06/2013	4,500.00	Breakfast Special Event	
		03/23/2013	2,500.00	Unsolicited	
			20,950.00		

Report Menu Name

Donations - Donor Report (Ranked) w/ Contact Info & Donation Totals

Description

Designed to be used with a Donation-based Selection Result, this report layout will show a ranked report of donations from largest to smallest. The selection used with this report should focus on very large single donations, restricted by time (such as the previous month) or some other factor which will likely yield one gift per donor. This report is meant to showcase single gifts from your top donors, and it includes a lot of other information about each donor, handy to have if you plan to call the donors personally to thank them for their exceptional generosity.

02/12/2018 **Donations - Donor Report (Ranked) w/ Contact Info & Donation Totals** **Page 1**

Donations $5,000 And Over

Rank	ID And Donor Type	Giving Entity/Address	Primary / Secondary Contact	Amount / Type Date	Account / Description Comments	Stimulus Description	CY	TOTALS	OTHER	TOTALS
1	29 Corporation	Mr. George Harrison Northern Songs Limited, (U.S. Division) 234 Abbey Road San Francisco CA 94161-2323	PH: PW: (510) 213-2132 PM: PF: SH: SW: SM: SF:	$70,000.00 AE 10/01/2015	123-45-456 Cash Unrestricted Sample donation for New Donor report	15AC 2015 Annual Campaign	2018: 2017: 2016: 2015:	$0.00 $0.00 $108,000.00 $70,000.00	Greatest Gift: Average Gift: Lifetime Total: Donation Count: Pledge Count:	$70,000.00 $28,625.00 $343,500.00 12 0
2	27 Corporation	Prof. James Burke The Corporation For Public Broadcasting 1105 Information Avenue San Francisco CA 94175	PH: ( ) - PW: (415) 555-1234 PM: PF: SH: SW: SM: SF:	$50,000.00 CK 03/31/2017	123-60-932 General Account	17AC 2017 Annual Campaign	2018: 2017: 2016: 2015:	$0.00 $50,000.00 $0.00 $0.00	Greatest Gift: Average Gift: Lifetime Total: Donation Count: Pledge Count:	$50,000.00 $50,000.00 $50,000.00 1 0

Report Menu Name

Donations - Grouped And Totaled By Month/Year, Subgrouped And Totaled By Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and totals by year and month, and subtotals within that by Donation Stimulus.

02/12/2018 **Donations - Grouped And Totaled By Month/Year, Subgrouped And Totaled By Stimulus** Page 16

All Donations

Month	Year	Stimulus	Amount	Count	In-Kinds	Count
December	2017	ACC				
			10,000.00	1	0	0
December	2017	SE				
			1,000.00	1	0	0
			11,800.00	3	0	0
January	2018					
			50.00	1	0	0
January	2018	18AC				
			5,500.00	2	0	0
January	2018	SE				
			1,000.00	1	0	0
			6,550.00	4	0	0
			742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By 5-Digit Zip Code

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail, along with donation amount subtotals and counts within each 5-digits zip code. This report is compatible with all types of donations, so be sure and limit you selection to either monetary gifts, or a specific alternate unit type (such as volunteer hours).

02/12/2018 Donations - Grouped By 5-Digit Zip Code Page 1
Donations For December of 2017

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Zip: 94304													
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
			800.00	1		0							
Zip: 94538													
53	Musk, Elon	12/15/2017	10,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	12/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
			11,000.00	2		0							
			11,800.00	3		0							

Report Menu Name

Donations - Grouped By 5-Digit Zip Code - Summary

Description

This is a variation on the, "Donations - Grouped By 5-Digit Zip Code" report which shows only the totals.

02/12/2018 **Donations - Grouped By 5-Digit Zip Code - Summary** **Page 1**

Donations For December of 2017

Zip	Amount	Count	In-Kinds	Count
94304	800.00	1	0	0
94538	11,000.00	2	0	0
	11,800.00	3	0	0

Report Menu Name

Donations - Grouped By Account

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail, subtotaled by Donation Account.

02/12/2018 **Donations - Grouped By Account** Page 4

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	TY	Comment
ACCOUNT: Cash Annual Fund												
7	Schmidt Aeronautic Foundation	03/28/2011	500.00				CK	123-45-457	11AC	1000		
20	Burke, James	02/13/2012	4,000.00				CK	123-45-457	UNSOL	3000	TC	
20	Burke, James	11/04/2013	100.00				CA	123-45-457	13AC	1000	T1	
2	Progressive Music, Inc.	02/23/2014	725.00				CA	123-45-457	BRKFST	1000	T2	
53	Musk, Elon	10/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
53	Musk, Elon	11/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
53	Musk, Elon	12/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
53	Musk, Elon	01/15/2018	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
			9,325.00	8		0						
ACCOUNT: Beneficial Account												
12	Hayward, Justin	07/02/2003	1,000.00				CK	123-45-678	03AC	1000	T1	
2	Progressive Music, Inc.	05/03/2012	222.00				CK	123-45-678	UNSOL	5000	TC	
23	Lodge, John	12/30/2012	300.00				CA	123-45-678	BRKFST	1000	T1	
20	Burke, James	05/15/2013	100.00				VC	123-45-678	13AC	1000	TC	Check #254
20	Burke, James	05/17/2013	30.00				MC	123-45-678	13AC	5000	T1	Check #896
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000	T2	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	T1	
			2,902.00	7		0						
ACCOUNT: General Donations												
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000	TC	
24	IBM Corporation	03/17/2013	1,234.00				CA	123-50-937	UNSOL	1000	TC	
18	Bowie, Denise	04/06/2013	4,500.00				CK	123-50-937	BRKFST	3000	T2	
17	Foster, James	04/11/2013	125.00				CA	123-50-937	13AC	1000	T2	
20	Burke, James	04/11/2013	58.00				MC	123-50-937	13AC	1000	T1	
4	Gore, Martin L.	10/21/2013	200.00				DC	123-50-937	13AC	1000	T2	Check #906
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000	T1	Example of soft credit donation
10	Waters, Roger	11/24/2014	10,000.00				CA	123-50-937	UNSOL	5000	TC	Given in Honor of Mozart on his birthday.
15	Baker, Thomas	12/07/2014	100.00				CK	123-50-937	14AC	1000	T1	
15	Baker, Thomas	01/04/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	02/04/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	03/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	05/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	06/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	07/07/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	08/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	09/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	11/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000	T1	

Report Menu Name

Donations - Grouped By Account - Summary

Description

This is a variation of the, "Donations - Grouped By Account" report, showing only totals for each Donation Account.

02/12/2018 **Donations - Grouped By Account - Summary** **Page 1**

All Donations

Account	Description	Amount	Count	In-Kinds	Count
		$7,750.00	3	16.00	2
100-4010-7001-701-0	Very Long Test Account	$2,000.00	1	0.00	0
123-45-456	Cash Unrestricted	$568,283.56	111	20.00	1
123-45-457	Cash Annual Fund	$9,325.00	8	0.00	0
123-45-678	Beneficial Account	$2,902.00	7	0.00	0
123-50-937	General Donations	$18,297.00	20	0.00	0
123-60-932	General Account	$113,786.67	64	0.00	0
123-70-MEM	Memorial Donation	$20,325.00	6	0.00	0
12345678901234567890	A Very Long Donation Account Number!	$200.00	1	0.00	0
		$742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Account, Ordered By Constituent Name Within Account

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and subtotals of donation amount and counts within each donation account. The donor's name is also included with the donation detail.

02/12/2018 **Donations - Grouped By Account, Ordered By Constituent Name Within Account** **Page 6**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	TY	Comment
27	The Corporation For Public Broad	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	T2	
3	Trek Foundation	11/30/2013	1,500.00				CK	123-60-932	13AC	1000	TC	
3	Trek Foundation	05/30/2013	1,500.00				CK	123-60-932	13AC	1000	TC	
10	Waters, Roger	01/11/2013	750.00				VC	123-60-932	MUSIC	1000	T1	
			113,786.67	64		0						
ACCOUNT: General Donations												
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	T1	
15	Baker, Thomas	12/07/2014	100.00				CK	123-50-937	14AC	1000	T1	
15	Baker, Thomas	01/04/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	02/04/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	03/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	05/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	06/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	07/07/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	08/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	09/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	11/06/2015	100.00				CK	123-50-937	15AC	1000	T1	
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000	T1	
18	Bowie, Denise	04/06/2013	4,500.00				CK	123-50-937	BRKFST	3000	T2	
20	Burke, James	04/11/2013	58.00				MC	123-50-937	13AC	1000	T1	
17	Foster, James	04/11/2013	125.00				CA	123-50-937	13AC	1000	T2	
4	Gore, Martin L.	10/21/2013	200.00				DC	123-50-937	13AC	1000	T2	Check #906
24	IBM Corporation	03/17/2013	1,234.00				CA	123-50-937	UNSOL	1000	TC	
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000	TC	
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000	T1	Example of soft credit donation
10	Waters, Roger	11/24/2014	10,000.00				CA	123-50-937	UNSOL	5000	TC	Given in Honor of Mozart on his birthday.
			18,297.00	20		0						
ACCOUNT: Memorial Donation												
18	Bowie, Denise	03/23/2013	2,500.00				VC	123-70-MEM	UNSOL	5000	TC	CC# 1234 234 134 3453
18	Bowie, Denise	01/05/2015	5,000.00				CA	123-70-MEM	UNSOL	5000	TC	
20	Burke, James	10/21/2013	200.00				CK	123-70-MEM	UNSOL	5000	T2	
4	Gore, Martin L.	10/11/2012	175.00				AE	123-70-MEM	UNSOL	1000	T1	
23	Lodge, John	01/23/2015	5,000.00				CA	123-70-MEM	UNSOL	5000	T1	Soft Credit to Bach Memorial
3	Trek Foundation	09/19/2012	7,450.00				CA	123-70-MEM	UNSOL	5000	TC	
			20,325.00	6		0						
ACCOUNT: Very Long Test Account												
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-7001-	11AC	1000	T1	Example donation for previous month's donations report

Report Menu Name

Donations - Grouped By Account, Subtotaled By Month And Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail totalled by donation account and subtotaled within account by the month and year of the donation date. Also included is the name of the donor to which each donation belongs.

02/12/2018 Donations - Grouped By Account, Subtotaled By Month And Year Page 15

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
MONTH AND YEAR: December, 2012													
23	Lodge, John	12/30/2012	300.00				CA	123-45-678	BRKFST	1000		T1	
			300.00	1		0							
MONTH AND YEAR: May, 2013													
20	Burke, James	05/15/2013	100.00				VC	123-45-678	13AC	1000		TC	Check #254
20	Burke, James	05/17/2013	30.00				MC	123-45-678	13AC	5000		T1	Check #896
			130.00	2		0							
MONTH AND YEAR: February, 2016													
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
			500.00	1		0							
MONTH AND YEAR: March, 2017													
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
			750.00	1		0							
			2,902.00	7		0							
ACCOUNT: 123-50-937													
MONTH AND YEAR: July, 2012													
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000		TC	
			230.00	1		0							
MONTH AND YEAR: March, 2013													
24	IBM Corporation	03/17/2013	1,234.00				CA	123-50-937	UNSOL	1000		TC	
			1,234.00	1		0							

Report Menu Name

Donations - Grouped By Account, Subtotalled by Fund

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail totalled by donation account and subtotaled within account by donation fund. Also included is the name of the donor to which each donation belongs.

02/12/2018 | **Donations - Grouped By Account, Subtotalled by Fund** | Page 5

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	TY	Comment
2	Progressive Music, Inc.	02/23/2014	725.00				CA	123-45-457	BRKFST	1000	T2	
			1,325.00	3	0.00	0						
FUND: 3000												
20	Burke, James	02/13/2012	4,000.00				CK	123-45-457	UNSOL	3000	TC	
			4,000.00	1	0.00	0						
FUND: STEMSTUD												
53	Musk, Elon	10/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
53	Musk, Elon	11/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
53	Musk, Elon	12/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
53	Musk, Elon	01/15/2018	1,000.00				CK	123-45-457	SE	STEMSTUD	T1	
			4,000.00	4	0.00	0						
			9,325.00	8	0.00	0						
ACCOUNT: 123-45-678												
FUND: 1000												
12	Hayward, Justin	07/02/2003	1,000.00				CK	123-45-678	03AC	1000	T1	
23	Lodge, John	12/30/2012	300.00				CA	123-45-678	BRKFST	1000	T1	
20	Burke, James	05/15/2013	100.00				VC	123-45-678	13AC	1000	TC	Check #254
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000	T2	
			1,900.00	4	0.00	0						
FUND: 3000												
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	T1	
			750.00	1	0.00	0						
FUND: 5000												
2	Progressive Music, Inc.	05/03/2012	222.00				CK	123-45-678	UNSOL	5000	TC	
20	Burke, James	05/17/2013	30.00				MC	123-45-678	13AC	5000	T1	Check #896
			252.00	2	0.00	0						

Report Menu Name

Donations - Grouped By Account, Subtotalled by Fund, Totals Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will show just the totals from the, "Donations - Grouped By Account, Subtotalled by Fund" report.

02/12/2018 Donations - Grouped By Account, Subtotalled by Fund, Totals Only Page 4

All Donations

	Amount	Count	In-Kinds	Count
ACCOUNT: 123-60-932				
FUND: 1000				
	$104,836.67	62	0.00	0
FUND: 3000				
	$8,950.00	2	0.00	0
	$113,786.67	64	0.00	0
ACCOUNT: 123-70-MEM				
FUND: 1000				
	$175.00	1	0.00	0
FUND: 5000				
	$20,150.00	5	0.00	0
	$20,325.00	6	0.00	0
ACCOUNT: 12345678901234567890				
FUND: 1000				
	$200.00	1	0.00	0

Report Menu Name

Donations - Grouped By Account, Subtotalled by Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail totalled by donation account and subtotaled within account by donation stimulus. Also included is the name of the donor to which each donation belongs.

03/01/2018 Donations - Grouped By Account, Subtotalled by Stimulus Page 2

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	TY	Comment
ACCOUNT: 123-45-456												
STIMULUS: 01AC												
32	Intrepid Systems Inc.	02/28/2001	200.00				CK	123-45-456	01AC	1000	T1	
			200.00	1	0.00	0						
STIMULUS: 03AC												
32	Intrepid Systems Inc.	01/25/2003	750.00				CK	123-45-456	03AC	1000	T1	
			750.00	1	0.00	0						
STIMULUS: 04AC												
32	Intrepid Systems Inc.	01/25/2004	1,000.00				CK	123-45-456	04AC	1000	T1	
			1,000.00	1	0.00	0						
STIMULUS: 05AC												
32	Intrepid Systems Inc.	01/24/2005	1,500.00				CK	123-45-456	05AC	1000	T1	
			1,500.00	1	0.00	0						
STIMULUS: 06AC												
32	Intrepid Systems Inc.	12/23/2006	500.00				CK	123-45-456	06AC	1000	T1	Soft Credit to Baker
29	Northern Songs Limited, (U.S. Div	04/01/2006	10,000.00				AE	123-45-456	06AC	1000	T1	Sample Donation
			10,500.00	2	0.00	0						
STIMULUS: 07AC												
12	Hayward, Justin	03/26/2007	10,000.00				CA	123-45-456	07AC	1000	T1	
32	Intrepid Systems Inc.	02/20/2007	900.00				CA	123-45-456	07AC	1000	T1	
			10,900.00	2	0.00	0						
STIMULUS: 08AC												
12	Hayward, Justin	12/26/2008	2,000.00				CA	123-45-456	08AC	1000	T1	
32	Intrepid Systems Inc.	12/02/2008	1,500.00				CK	123-45-456	08AC	1000	T1	

Report Menu Name

Donations - Grouped By Account, Subtotalled by Stimulus, Totals Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will show just the totals from the, "Donations - Grouped By Account, Subtotalled by Stimulus" report.

02/12/2018 **Donations - Grouped By Account, Subtotalled by Stimulus, Totals Only** Page 7

All Donations

Amount	Count	In-Kinds	Count
ACCOUNT: 123-70-MEM			
STIMULUS: UNSOL			
$20,325.00	6	0.00	0
$20,325.00	6	0.00	0
ACCOUNT: 12345678901234567890			
STIMULUS: 11AC			
$200.00	1	0.00	0
$200.00	1	0.00	0
$742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Appeal

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with subtotals by donation appeal.

02/12/2018 Donations - Grouped By Appeal Page 6

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
32	Intrepid Systems Inc.	01/15/2018	500.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
53	Musk, Elon	01/15/2018	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
			218,750.00	46		0							
Appeal: APPEAL2													
17	Foster, James	04/20/2011	500.00				CA	123-45-456	11AC	1000	APPEAL2	T1	
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-700	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
15	Baker, Thomas	05/27/2011	300.00				AE	123-45-456	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	09/30/2011	200.00				AE	12345678901	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	10/20/2011			20.00		HR	123-45-456	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	04/22/2012	500.00				AE	123-45-456	12AC	1000	APPEAL2	T1	
			3,500.00	5		1							
			742,869.23	221		3							

Report Menu Name

Donations - Grouped By Appeal - Summary

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will subtotals for each donation appeal.

02/12/2018 **Donations - Grouped By Appeal - Summary** **Page 1**

All Donations

Appeal	Description	Amount	Count	In-Kinds	Count
		506,769.23	163	16.00	2
17ACA1	2017 Annual Campaign Appeal 1	100.00	1	0	0
AM1	AM1	13,750.00	6	0	0
APPEAL1	Appeal Mailing 1	218,750.00	46	0	0
APPEAL2	APPEAL2	3,500.00	5	20.00	1
		742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Appeal - Summary - Current And Past 2 Fiscal Years Only

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total giving by Donation Appeal for the current and past two fiscal years. A difference column between the current and previous fiscal year is also shown.

02/12/2018 Donations - Grouped By Appeal - Summary - Current And Past 2 Fiscal Years Only Page 1

All Donations

Donation Appeal	Description	2016	2017	2018	2018 - 2017 (Difference)
		73,600.00	108,600.00	850.00	-107,750.00
17ACA1	2017 Annual Campaign Appeal 1	0.00	100.00	0.00	-100.00
AM1	AM1	2,000.00	5,000.00	0.00	-5,000.00
APPEAL1	Appeal Mailing 1	18,500.00	96,450.00	19,500.00	-76,950.00
APPEAL2	APPEAL2	0.00	0.00	0.00	0.00
		94,100.00	210,150.00	20,350.00	-189,800.00

Report Menu Name

Donations - Grouped By Calendar Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and subtotals by calendar year.

02/12/2018 Donations - Grouped By Calendar Year Page 7

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
15	Baker, Thomas	05/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
15	Baker, Thomas	06/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
15	Baker, Thomas	07/07/2015	100.00				CK	123-50-937	15AC	1000		T1	
15	Baker, Thomas	08/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
32	Intrepid Systems Inc.	08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
15	Baker, Thomas	09/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
12	Hayward, Justin	09/26/2015	7,500.00				CA	123-45-456	15AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample donation for New Donor report
15	Baker, Thomas	10/06/2015	100.00				CK	123-60-932	15AC	1000		T1	
15	Baker, Thomas	11/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
53	Musk, Elon	12/08/2015	5,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			107,200.00	21		0							
Year: 2016													
15	Baker, Thomas	01/22/2016	2,500.00				CK	123-45-456	UNSOL	1000		T1	
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000		T1	
12	Hayward, Justin	10/26/2016	8,000.00				CA	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
29	Northern Songs Limited, (U.S.												
29	Northern Songs Limited, (U.S.	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
		11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample donation for New Donor report
53	Musk, Elon	12/10/2016	6,500.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			136,600.00	11		0							
Year: 2017													
7	Schmidt Aeronautic Foundatio	01/05/2017	600.00				CK	123-60-932	UNSOL	1000		T1	
17	Foster, James	01/30/2017	450.00				CK	123-60-932	17AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
53	Musk, Elon	03/10/2017	7,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.												
		04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here

Report Menu Name

Donations - Grouped By Calendar Year - Summary

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show total income by year plus gift counts for both monetary and in-kind donations.

02/12/2018 **Donations - Grouped By Calendar Year - Summary** Page 1

All Donations

Year	Amount	Count	In-Kinds	Count
1997	150.00	2.00	0.00	0.00
1998	200.00	1.00	0.00	0.00
1999	550.00	3.00	0.00	0.00
2000	600.00	1.00	0.00	0.00
2001	1,350.00	3.00	0.00	0.00
2002	4,610.00	6.00	0.00	0.00
2003	12,750.00	13.00	0.00	0.00
2004	5,500.00	4.00	0.00	0.00
2005	6,500.00	2.00	0.00	0.00
2006	10,550.00	3.00	0.00	0.00
2007	16,500.00	5.00	0.00	0.00
2008	18,750.00	5.00	0.00	0.00
2009	18,200.00	6.00	0.00	0.00
2010	29,000.00	8.00	0.00	0.00
2011	39,750.00	13.00	20.00	1.00
2012	68,246.56	25.00	0.00	0.00
2013	75,277.67	52.00	8.00	1.00
2014	87,585.00	16.00	8.00	1.00
2015	107,200.00	21.00	0.00	0.00
2016	136,600.00	11.00	0.00	0.00
2017	96,450.00	17.00	0.00	0.00
2018	6,550.00	4.00	0.00	0.00
	742,869.23	221.00	36.00	3.00

Report Menu Name

Donations - Grouped By County

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and subtotals by county.

02/12/2018 Donations - Grouped By County Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
County: Alameda													
53	Musk, Elon	03/15/2015	4,500.00				CK	123-45-456	15AC	1000	APPEAL1	T1	
53	Musk, Elon	12/08/2015	5,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
53	Musk, Elon	12/10/2016	6,500.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	03/10/2017	7,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
53	Musk, Elon	10/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	11/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	12/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	12/15/2017	10,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	01/10/2018	5,000.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
53	Musk, Elon	01/15/2018	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
			48,000.00	11		0							
County: King													
12	Hayward, Justin	01/25/1997	100.00				CK	123-45-456	UNSOL	1000		T1	
12	Hayward, Justin	02/28/1997	50.00				CK	123-45-456	UNSOL	1000		T1	
12	Hayward, Justin	01/25/1998	200.00				CK	123-45-456	UNSOL	1000		T1	
12	Hayward, Justin	01/25/1999	400.00				CK	123-45-456	UNSOL	1000		T1	
32	Intrepid Systems Inc.	01/25/1999	100.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	02/28/1999	50.00				CK	123-45-456	MUSIC	1000		T1	
12	Hayward, Justin	01/25/2000	600.00				CK	123-45-456	UNSOL	1000		T1	
32	Intrepid Systems Inc.	01/24/2001	400.00				CK	123-45-456	MUSIC	1000		T1	
12	Hayward, Justin	01/25/2001	750.00				CK	123-45-456	UNSOL	1000		T1	
32	Intrepid Systems Inc.	02/28/2001	200.00				CK	123-45-456	01AC	1000		T1	
32	Intrepid Systems Inc.	01/24/2002	600.00				CK	123-45-456	MUSIC	1000		T1	
12	Hayward, Justin	01/25/2002	1,000.00				CK	123-45-456	UNSOL	1000		T1	
12	Hayward, Justin	10/03/2002	1,000.00				CK	123-60-932	02AC	1000		T1	
12	Hayward, Justin	11/04/2002	10.00				VC	123-60-932	02AC	1000		T1	
12	Hayward, Justin	12/02/2002	1,000.00				CK	123-60-932	02AC	1000		T1	
12	Hayward, Justin	12/30/2002	1,000.00				CK	123-60-932	02AC	1000		T1	
12	Hayward, Justin	01/25/2003	1,000.00				CK	123-45-456	UNSOL	1000		T1	
32	Intrepid Systems Inc.	01/25/2003	750.00				CK	123-45-456	03AC	1000		T1	
12	Hayward, Justin	01/31/2003	1,000.00				CK	123-60-932	03AC	1000		T2	
12	Hayward, Justin	03/04/2003	1,000.00				AE	123-60-932	03AC	1000		T1	
12	Hayward, Justin	04/06/2003	1,000.00				AE	123-60-932	03AC	1000		T1	
12	Hayward, Justin	05/01/2003	1,000.00				CK	123-60-932	03AC	1000		T1	
12	Hayward, Justin	06/01/2003	1,000.00				MC	123-60-932	03AC	1000		T2	
12	Hayward, Justin	07/02/2003	1,000.00				CK	123-45-678	03AC	1000		T1	
12	Hayward, Justin	08/01/2003	1,000.00				CK	123-60-932	03AC	1000		T1	
12	Hayward, Justin	09/16/2003	1,000.00				CK	123-60-932	03AC	1000		T1	Check #053
12	Hayward, Justin	10/03/2003	1,000.00				CK	123-60-932	03AC	1000		T2	
12	Hayward, Justin	11/05/2003	1,000.00				CK	123-60-932	03AC	1000		T1	
12	Hayward, Justin	12/02/2003	1,000.00				CK	123-60-932	03AC	1000		T1	
12	Hayward, Justin	01/01/2004	1,000.00				CK	123-60-932	04AC	1000		T1	
12	Hayward, Justin	01/25/2004	2,500.00				CK	123-45-456	UNSOL	1000		T1	
32	Intrepid Systems Inc.	01/25/2004	1,000.00				CK	123-45-456	04AC	1000		T1	
12	Hayward, Justin	01/30/2004	1,000.00				CK	123-60-932	04AC	1000		T1	

Report Menu Name

Donations - Grouped By County - Summary

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show only donation amount totals and counts by county.

02/12/2018 **Donations - Grouped By County - Summary** **Page 1**

All Donations

County	Amount	Count	In-Kinds	Count
Alameda	48,000.00	11	0	0
King	131,256.00	72	0	0
Lane	2,160.00	6	0	0
Palo Alto	850.00	6	0	0
San Diego	500.00	1	0	0
San Francisco	410,500.00	15	0	0
San Mateo	20,450.00	7	8.00	1
Santa Clara	103,453.23	93	28.00	2
Schenectady	1,000.00	1	0	0
Siskiyou	11,200.00	5	0	0
Sutter	13,500.00	4	0	0
	742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Date

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and totals for each day.

02/12/2018 **Donations - Grouped By Date** **Page 1**

All Donations

Donation Date	Amount	Organization Name	Count	In-Kinds	Count
01/15/2018	500.00	Intrepid Systems Inc.			
01/15/2018	1,000.00	SpaceX			
	1,500.00		2	0	0
01/10/2018	5,000.00	SpaceX			
	5,000.00		1	0	0
01/07/2018	50.00	Decca Records			
	50.00		1	0	0
12/31/2017	800.00				
	800.00		1	0	0
12/15/2017	1,000.00	SpaceX			
12/15/2017	10,000.00	SpaceX			
	11,000.00		2	0	0
11/15/2017	1,000.00	SpaceX			
	1,000.00		1	0	0
10/15/2017	1,000.00	SpaceX			
	1,000.00		1	0	0
04/25/2017	100.00	Intrepid Systems Inc.			
04/25/2017	100.00	Intrepid Systems Inc.			
	200.00		2	0	0
04/15/2017	500.00	Bach Memorial Account			
	500.00		1	0	0
03/31/2017	4,000.00				
03/31/2017	750.00				
03/31/2017	8,450.00				
03/31/2017	50,000.00	The Corporation For Public Broadcasting			
	63,200.00		4	0	0

Report Menu Name

Donations - Grouped By Date - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals for each day.

02/12/2018 **Donations - Grouped By Date - Summary** Page 1

All Donations

Donation Date	Amount	Count	In-Kinds	Count
01/15/2018	1,500.00	2	0	0
01/10/2018	5,000.00	1	0	0
01/07/2018	50.00	1	0	0
12/31/2017	800.00	1	0	0
12/15/2017	11,000.00	2	0	0
11/15/2017	1,000.00	1	0	0
10/15/2017	1,000.00	1	0	0
04/25/2017	200.00	2	0	0
04/15/2017	500.00	1	0	0
03/31/2017	63,200.00	4	0	0
03/26/2017	9,700.00	1	0	0
03/10/2017	7,000.00	1	0	0
03/04/2017	1,000.00	1	0	0
01/30/2017	450.00	1	0	0
01/05/2017	600.00	1	0	0
12/10/2016	6,500.00	1	0	0
11/20/2016	14,000.00	1	0	0
11/15/2016	5,000.00	1	0	0
11/03/2016	24,000.00	1	0	0
11/02/2016	45,000.00	1	0	0
11/01/2016	25,000.00	1	0	0
10/26/2016	8,000.00	1	0	0
05/10/2016	100.00	1	0	0
03/29/2016	6,000.00	1	0	0
02/24/2016	500.00	1	0	0
01/22/2016	2,500.00	1	0	0
12/08/2015	5,000.00	1	0	0
11/06/2015	100.00	1	0	0
10/06/2015	100.00	1	0	0
10/01/2015	70,000.00	1	0	0
09/26/2015	7,500.00	1	0	0
09/06/2015	100.00	1	0	0
08/31/2015	2,000.00	1	0	0
08/06/2015	100.00	1	0	0
07/07/2015	100.00	1	0	0
06/06/2015	100.00	1	0	0
05/06/2015	100.00	1	0	0
04/05/2015	700.00	1	0	0
03/15/2015	4,500.00	1	0	0
03/09/2015	500.00	1	0	0
03/06/2015	100.00	1	0	0
02/04/2015	100.00	1	0	0

Report Menu Name

Donations - Grouped By Day/Month/Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and subtotals by the day of the month, within each month and year. In the example below we see there were four donations on March 31st, 2017, and they are all grouped together and subtotaled.

02/12/2018 **Donations - Grouped By Day/Month/Year** **Page 27**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
- 4 March, 2017													
32	Intrepid Systems Inc.	03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
			1,000.00	1		0							
- 10 March, 2017													
53	Musk, Elon	03/10/2017	7,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
			7,000.00	1		0							
- 26 March, 2017													
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.
			9,700.00	1		0							
- 31 March, 2017													
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
27	The Corporation For Pub	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
			63,200.00	4		0							
- 15 April, 2017													
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
			500.00	1		0							
- 25 April, 2017													
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here
			200.00	2		0							

Report Menu Name

Donations - Grouped By Day/Month/Year - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show only totals by day of the month within each month and year.

02/14/2018 **Donations - Grouped By Day/Month/Year - Summary** **Page 4**

All Donations

Day/Month/Year	Amount	Count	In-Kinds	Count
15 November, 2017	1,000.00	1	0	0
15 December, 2017	11,000.00	2	0	0
31 December, 2017	800.00	1	0	0
7 January, 2018	50.00	1	0	0
10 January, 2018	5,000.00	1	0	0
15 January, 2018	1,500.00	2	0	0
	742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Donation Amounts, With Counts

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and actually group donations by amount, showing subtotals and counts of all donations of the same amount.

02/14/2018 **Donations - Grouped By Donation Amounts, With Counts** Page 2
All Donations

Giving Entity	Amount	Count
Trek Foundation	7,450.00	
	7,450.00	1
Musk, Elon	7,000.00	
	7,000.00	1
Hayward, Justin	6,500.00	
Musk, Elon	6,500.00	
	13,000.00	2
Hayward, Justin	6,000.00	
Musk, Elon	6,000.00	
	12,000.00	2
Baker, Thomas	5,000.00	
Baker, Thomas	5,000.00	
Bowie, Denise	5,000.00	
Hayward, Justin	5,000.00	
Hayward, Justin	5,000.00	
Intrepid Systems Inc.	5,000.00	
Knight, Paula	5,000.00	
Lennon, John	5,000.00	
Lodge, John	5,000.00	
Musk, Elon	5,000.00	
Musk, Elon	5,000.00	
	55,000.00	11
Burke, James	4,520.00	
	4,520.00	1
Bowie, Denise	4,500.00	
Musk, Elon	4,500.00	
	9,000.00	2
Burke, James	4,000.00	
Intrepid Systems Inc.	4,000.00	
Schmidt Aeronautic Foundation	4,000.00	
Waters, Roger	4,000.00	
Waters, Roger	4,000.00	
	20,000.00	5

Report Menu Name

Donations - Grouped By Donation Type

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and subtotals by Donation Type. Donations are shown strictly in chronological order within each Donation Type, so the donations for each donor will not necessarily be consecutive. If you wish donations to be subordered by donor, use the, "Donations - Grouped By Donation Type, Subordered By Giving Entity" report layout instead.

02/14/2018 — **Donations - Grouped By Donation Type** — Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Donation Type:													
11	Decca Records	01/07/2018	50.00										
			50.00	1		0							
Donation Type: AE													
12	Hayward, Justin	03/04/2003	1,000.00				AE	123-60-932	03AC	1000		T1	
12	Hayward, Justin	04/06/2003	1,000.00				AE	123-60-932	03AC	1000		T1	
29	Northern Songs Limited,	04/01/2006	10,000.00				AE	123-45-456	06AC	1000		T1	Sample Donation
29	Northern Songs Limited,	05/01/2008	15,000.00				AE	123-45-456	08AC	1000		T1	Sample Donation
29	Northern Songs Limited,	06/12/2009	500.00				AE	123-45-456	09AC	1000		T1	Sample Donation
32	Intrepid Systems Inc.	11/17/2009	2,500.00				AE	123-45-456	09AC	1000		T1	
32	Intrepid Systems Inc.	03/26/2010	4,000.00				AE	123-45-456	10AC	1000		T1	
29	Northern Songs Limited,	06/01/2010	20,000.00				AE	123-45-456	10AC	1000		T1	Sample Donation
12	Hayward, Justin	11/20/2010	1,000.00				AE	123-45-456	10AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	02/18/2011	1,500.00				AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's donation
3	Trek Foundation	05/12/2011	400.00				AE	123-45-456	11AC	1000	APPEAL1	T1	Sample Donation
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-7001	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
15	Baker, Thomas	05/27/2011	300.00				AE	123-45-456	11AC	1000	APPEAL2	T1	
29	Northern Songs Limited,	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
15	Baker, Thomas	09/30/2011	200.00				AE	123456789012	11AC	1000	APPEAL2	T1	
12	Hayward, Justin	12/19/2011	1,000.00				AE	123-45-456	11AC	1000	APPEAL1	T1	
10	Waters, Roger	01/05/2012	750.00				AE	123-45-456	MUSIC	1000		T1	
10	Waters, Roger	02/05/2012	750.00				AE	123-45-456	12AC	1000		T1	
15	Baker, Thomas	04/22/2012	500.00				AE	123-45-456	12AC	1000	APPEAL2	T1	
29	Northern Songs Limited,	08/01/2012	40,000.00				AE	123-45-456	12AC	1000		T1	Sample Donation
4	Gore, Martin L.	10/11/2012	175.00				AE	123-70-MEM	UNSOL	1000		T1	
20	Burke, James	10/11/2013	432.00				AE	123-60-932	UNSOL	1000		T1	
29	Northern Songs Limited,	09/01/2014	50,000.00				AE	123-45-456	14AC	1000		T1	Sample Donation
29	Northern Songs Limited,	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			361,007.00	28		0							
Donation Type: CA													
32	Intrepid Systems Inc.	02/20/2007	900.00				CA	123-45-456	07AC	1000	APPEAL1	T1	
12	Hayward, Justin	03/26/2007	10,000.00				CA	123-45-456	07AC	1000	APPEAL1	T1	
5	Mozart Memorial Account	09/28/2007	500.00				CA	123-45-456	UNSOL	1000			
12	Hayward, Justin	12/26/2008	2,000.00				CA	123-45-456	08AC	1000	APPEAL1	T1	
15	Baker, Thomas	02/19/2009	5,000.00				CA	123-45-456	09AC	1000	APPEAL1	T1	
12	Hayward, Justin	05/15/2009	9,700.00				CA	123-45-456	09AC	1000	APPEAL1	T1	
26	Smith, John	12/03/2010	200.00				CA	123-45-456	10AC	1000	APPEAL1	T1	

Report Menu Name

Donations - Grouped By Donation Type - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show subtotals by Donation Type.

02/14/2018 **Donations - Grouped By Donation Type - Summary** Page 1

All Donations

Donation Type	Description	Amount	Count	In-Kinds	Count
		50.00	1	0	0
AE	American Express	361,007.00	28	0	0
CA	Cash Donation	142,727.56	43	0	0
CK	Check	213,887.67	120	0	0
DC	DC	430.00	2	0	0
HR	Hours	0.00	0	36.00	3
IK	In-Kind Gift	200.00	1	0	0
MC	Master Card	2,547.00	5	0	0
VC	Visa Card	22,020.00	21	0	0
		742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Donation Type, Subordered By Giving Entity

Description

This is a variation on the, "Donations - Grouped By Donation Type" report which suborders donations by donor name within each donation type, so the donations for each donor with a given donation type will be consecutive.

02/14/2018 **Donations - Grouped By Donation Type, Subordered By Giving Entity** **Page 1**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Donation Type:													
11	Decca Records	01/07/2018	50.00										
			50.00	1		0							
Donation Type: AE													
15	Baker, Thomas	04/22/2012	500.00				AE	123-45-456	12AC	1000	APPEAL2	T1	
15	Baker, Thomas	09/30/2011	200.00				AE	123456789012	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	05/27/2011	300.00				AE	123-45-456	11AC	1000	APPEAL2	T1	
20	Burke, James	10/11/2013	432.00				AE	123-60-932	UNSOL	1000		T1	
4	Gore, Martin L.	10/11/2012	175.00				AE	123-70-MEM	UNSOL	1000		T1	
12	Hayward, Justin	12/19/2011	1,000.00				AE	123-45-456	11AC	1000	APPEAL1	T1	
12	Hayward, Justin	11/20/2010	1,000.00				AE	123-45-456	10AC	1000	APPEAL1	T1	
12	Hayward, Justin	04/06/2003	1,000.00				AE	123-60-932	03AC	1000		T1	
12	Hayward, Justin	03/04/2003	1,000.00				AE	123-60-932	03AC	1000		T1	
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-7001	11AC	1000	APPEAL2	T1	Example donation for previous
32	Intrepid Systems Inc.												month's donations report
32	Intrepid Systems Inc.	02/18/2011	1,500.00				AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's
32	Intrepid Systems Inc.												donation
		03/26/2010	4,000.00				AE	123-45-456	10AC	1000		T1	
		11/17/2009	2,500.00				AE	123-45-456	09AC	1000		T1	
29	Northern Songs Limited,	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
29	Northern Songs Limited,	09/01/2014	50,000.00				AE	123-45-456	14AC	1000		T1	Sample Donation
29	Northern Songs Limited,	08/01/2012	40,000.00				AE	123-45-456	12AC	1000		T1	Sample Donation
29	Northern Songs Limited,	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
29	Northern Songs Limited,	06/01/2010	20,000.00				AE	123-45-456	10AC	1000		T1	Sample Donation
29	Northern Songs Limited,	06/12/2009	500.00				AE	123-45-456	09AC	1000		T1	Sample Donation
29	Northern Songs Limited,	05/01/2008	15,000.00				AE	123-45-456	08AC	1000		T1	Sample Donation
29	Northern Songs Limited,	04/01/2006	10,000.00				AE	123-45-456	06AC	1000		T1	Sample Donation
3	Trek Foundation	05/12/2011	400.00				AE	123-45-456	11AC	1000	APPEAL1	T1	Sample Donation
10	Waters, Roger	02/05/2012	750.00				AE	123-45-456	12AC	1000		T1	
10	Waters, Roger	01/05/2012	750.00				AE	123-45-456	MUSIC	1000		T1	
			361,007.00	28		0							
Donation Type: CA													
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
28	Bach Memorial Account	02/04/2013	250.00				CA	123-45-456	13AC	1000	AM1	T1	
28	Bach Memorial Account	01/04/2013	500.00				CA	123-45-456	13AC	1000	AM1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
15	Baker, Thomas	02/19/2009	5,000.00				CA	123-45-456	09AC	1000	APPEAL1	T1	
18	Bowie, Denise	01/05/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		TC	

Report Menu Name

Donations - Grouped By Donor And Fund - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals and counts for each donor, and within each donor, donations are grouped and subtotaled by Donation Fund.

02/14/2018 **Donations - Grouped By Donor And Fund - Summary** Page 10
All Donations

	Amount	Count
Donor: Trek Foundation; 1701 Enterprise Way; Mount Shasta, CA 96067-1234		
Fund: 1000 - Unrestricted Fund		
	3,400.00	3
Fund: 3000 - Scholarship Fund		
	350.00	1
Fund: 5000 - Memorial Fund		
	7,450.00	1
	11,200.00	5
Donor: Waters, Roger; 1234 Beyond The Wall Way; San Mateo, CA 94403		
Fund: 1000 - Unrestricted Fund		
	10,250.00	5
Fund: 5000 - Memorial Fund		
	10,000.00	1

Report Menu Name

Donations - Grouped By Donor Name With Address, Donation Totals, Counts, And Averages

Description

Designed to be used with a Donation-based Selection Result, this report layout will show monetary totals and gift counts by donor name, along with their average gift. Note that the totals and average gift amount reflect only those gifts included in the selection result you use with the report.

02/14/2018 **Donations - Grouped By Donor Name With Address, Donation Totals, Counts, And Averages** Page 1

All Donations

Donor Name	Address	City	State	Zip	Amount	Count	Average
1984 Productions	1984 In The Village	Oceania	CA	95070-3212	2,000.00	5	400.00
Bach Memorial Account	3543 Brandenburg Way	Seattle	WA	98109	1,250.00	3	416.67
Baker, Thomas	4968 Tardis Ave.	San Jose	CA	95112-3211	21,550.00	28	769.64
Bowie, Denise	123 First Avenue	San Jose	CA	95119-2312	20,950.00	5	4,190.00
Burke, James	826 Connections Way	Palo Alto	CA	94304-7899	24,014.00	29	828.07
Decca Records	3775 Galafrey Way	Palo Alto	CA	94300-2112	850.00	6	141.67
Foster, James	14552 Medical Dr.	Saratoga	CA	95070-3212	1,625.00	6	270.83
Gore, Martin L.	Stanford OPA Bldg.	Eugene	OR	97401	2,160.00	6	360.00
Hayward, Justin	1701 Enterprise Way	Seattle	WA	98109	94,010.00	38	2,473.95
IBM Corporation	486 Intel Way.	San Jose	CA	95131-1234	14,814.23	3	4,938.08
Intrepid Systems Inc.	701 Galer St.	Seattle	WA	98109	33,100.00	25	1,324.00
Knight, Paula	1410 Holly Ave.	San Jose	CA	95133-4333	11,800.00	12	983.33
Lennon, John	234 Abbey Road	San Francisco	CA	94161-2323	17,000.00	2	8,500.00
Lodge, John	71828 One Way	Yuba City	CA	95991-3171	13,500.00	4	3,375.00
Mozart Memorial Account	62734 Vienna Ave	Salzburg	CA	92104	500.00	1	500.00
Musk, Elon	3141 Tesla Ave.	Fremont	CA	94538	48,000.00	11	4,363.64
Northern Songs Limited, (U.S. Division)	234 Abbey Road	San Francisco	CA	94161-2323	343,500.00	12	28,625.00
Progressive Music, Inc.	644 Santa Rita	Seattle	WA	98109-1234	2,896.00	6	482.67
Schmidt Aeronautic Foundation	368 Moore Ave.	Saratoga	CA	95070-1234	6,700.00	5	1,340.00
Scott, Montgomery	685 Cherrystone Drive	Schenectady	NY	12345	1,000.00	1	1,000.00
Smith, John	4321 Another Smith Way	San Mateo	CA	94403	200.00	1	200.00
The Corporation For Public Broadcasting	1105 Information Avenue	San Francisco	CA	94175	50,000.00	1	50,000.00
Trek Foundation	1701 Enterprise Way	Mount Shasta	CA	96067-1234	11,200.00	5	2,240.00
Waters, Roger	1234 Beyond The Wall Wa	San Mateo	CA	94403	20,250.00	6	3,375.00
					742,869.23	221	3,361.40

Report Menu Name

Donations - Grouped By Donor Name With Calendar Year Totals And Counts

Description

Designed to be used with a Donation-based Selection Result, this report layout will show monetary totals and gift counts for the current and past two calendar years.

02/14/2018 **Donations - Grouped By Donor Name With Calendar Year Totals And Counts** **Page 1**

All Donations

Donor Name	2018 Total	2018 Count	2017 Total	2017 Count	2016 Total	2016 Count
1984 Productions	0.00	0	0.00	0	0.00	0
Bach Memorial Account	0.00	0	500.00	1	0.00	0
Baker, Thomas	0.00	0	750.00	1	2,600.00	2
Bowie, Denise	0.00	0	8,450.00	1	0.00	0
Burke, James	0.00	0	800.00	1	500.00	1
Decca Records	50.00	1	0.00	0	0.00	0
Foster, James	0.00	0	450.00	1	0.00	0
Gore, Martin L.	0.00	0	0.00	0	0.00	0
Hayward, Justin	0.00	0	9,700.00	1	8,000.00	1
IBM Corporation	0.00	0	0.00	0	0.00	0
Intrepid Systems Inc.	500.00	1	1,200.00	3	5,000.00	1
Knight, Paula	0.00	0	0.00	0	0.00	0
Lennon, John	0.00	0	0.00	0	0.00	0
Lodge, John	0.00	0	0.00	0	0.00	0
Mozart Memorial Account	0.00	0	0.00	0	0.00	0
Musk, Elon	6,000.00	2	20,000.00	5	12,500.00	2
Northern Songs Limited, (U.S. Division)	0.00	0	0.00	0	108,000.00	4
Progressive Music, Inc.	0.00	0	0.00	0	0.00	0
Schmidt Aeronautic Foundation	0.00	0	600.00	1	0.00	0
Scott, Montgomery	0.00	0	0.00	0	0.00	0
Smith, John	0.00	0	0.00	0	0.00	0
The Corporation For Public Broadcasting	0.00	0	50,000.00	1	0.00	0
Trek Foundation	0.00	0	0.00	0	0.00	0
Waters, Roger	0.00	0	4,000.00	1	0.00	0
	6,550.00	4	96,450.00	17	136,600.00	11

Report Menu Name

Donations - Grouped By Donor Name With Donation Totals, Counts, And Averages

Description

This is a simplified version of the, "Donations - Grouped By Donor Name With Address, Donation Totals, Counts, And Averages" report. It will show monetary totals and gift counts by donor name, along with their average gift. Note that the totals and average gift amount reflect only those gifts included in the selection result you use with the report.

02/14/2018 **Donations - Grouped By Donor Name With Donation Totals, Counts, And Averages** Page 1

All Donations

Donor Name	Amount	Count	Average
1984 Productions	2,000.00	5	400.00
Bach Memorial Account	1,250.00	3	416.67
Baker, Thomas	21,550.00	28	769.64
Bowie, Denise	20,950.00	5	4,190.00
Burke, James	24,014.00	29	828.07
Decca Records	850.00	6	141.67
Foster, James	1,625.00	6	270.83
Gore, Martin L.	2,160.00	6	360.00
Hayward, Justin	94,010.00	38	2,473.95
IBM Corporation	14,814.23	3	4,938.08
Intrepid Systems Inc.	33,100.00	25	1,324.00
Knight, Paula	11,800.00	12	983.33
Lennon, John	17,000.00	2	8,500.00
Lodge, John	13,500.00	4	3,375.00
Mozart Memorial Account	500.00	1	500.00
Musk, Elon	48,000.00	11	4,363.64
Northern Songs Limited, (U.S. Division)	343,500.00	12	28,625.00
Progressive Music, Inc.	2,896.00	6	482.67
Schmidt Aeronautic Foundation	6,700.00	5	1,340.00
Scott, Montgomery	1,000.00	1	1,000.00
Smith, John	200.00	1	200.00
The Corporation For Public Broadcasting	50,000.00	1	50,000.00
Trek Foundation	11,200.00	5	2,240.00
Waters, Roger	20,250.00	6	3,375.00
	742,869.23	221	3,361.40

Report Menu Name

Donations - Grouped By Donor Name With Fiscal Year Totals And Counts

Description

Designed to be used with a Donation-based Selection Result, this report layout will show monetary totals and gift counts for the current and past two fiscal years.

02/14/2018 Donations - Grouped By Donor Name With Fiscal Year Totals And Counts Page 1

All Donations

Donor Name	2018 Total	2018 Count	2017 Total	2018 Count	2016 Total	2016 Count
1984 Productions	$0.00	0	$0.00	0	$0.00	0
Bach Memorial Account	$0.00	0	$500.00	1	$0.00	0
Baker, Thomas	$0.00	0	$750.00	1	$3,100.00	7
Bowie, Denise	$0.00	0	$8,450.00	1	$0.00	0
Burke, James	$800.00	1	$0.00	0	$500.00	1
Decca Records	$50.00	1	$0.00	0	$0.00	0
Foster, James	$0.00	0	$450.00	1	$0.00	0
Gore, Martin L.	$0.00	0	$0.00	0	$0.00	0
Hayward, Justin	$0.00	0	$17,700.00	2	$7,500.00	1
IBM Corporation	$0.00	0	$0.00	0	$0.00	0
Intrepid Systems Inc.	$500.00	1	$6,200.00	4	$2,000.00	1
Knight, Paula	$0.00	0	$0.00	0	$0.00	0
Lennon, John	$0.00	0	$0.00	0	$0.00	0
Lodge, John	$0.00	0	$0.00	0	$0.00	0
Mozart Memorial Account	$0.00	0	$0.00	0	$0.00	0
Musk, Elon	$19,000.00	6	$13,500.00	2	$11,000.00	2
Northern Songs Limited, (U.S. Division)	$0.00	0	$108,000.00	4	$70,000.00	1
Progressive Music, Inc.	$0.00	0	$0.00	0	$0.00	0
Schmidt Aeronautic Foundation	$0.00	0	$600.00	1	$0.00	0
Scott, Montgomery	$0.00	0	$0.00	0	$0.00	0
Smith, John	$0.00	0	$0.00	0	$0.00	0
The Corporation For Public Broadcasting	$0.00	0	$50,000.00	1	$0.00	0
Trek Foundation	$0.00	0	$0.00	0	$0.00	0
Waters, Roger	$0.00	0	$4,000.00	1	$0.00	0
	$20,350.00	9	$210,150.00	19	$94,100.00	13

Report Menu Name

Donations - Grouped By Donor Type

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and subtotals by Donor Type. Within Donor Type, donations will be grouped by the donor to which they belong.

02/14/2018 | Donations - Grouped By Donor Type | Page 6

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Donor Type: M													
5	Mozart Memorial Accoun	09/28/2007	500.00				CA	123-45-456	UNSOL	1000			
28	Bach Memorial Account	01/04/2013	500.00				CA	123-45-456	13AC	1000	AM1	T1	
28	Bach Memorial Account	02/04/2013	250.00				CA	123-45-456	13AC	1000	AM1	T1	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
			1,750.00	4		0							
Donor Type: O													
2	Progressive Music, Inc.	05/03/2012	222.00				CK	123-45-678	UNSOL	5000		TC	
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000		TC	
2	Progressive Music, Inc.	10/19/2012	835.00				CA	123-45-456	12AC	1000		T1	
2	Progressive Music, Inc.	07/24/2013	434.00				MC	123-60-932	13AC	1000		T2	
2	Progressive Music, Inc.	08/11/2013	450.00				VC	123-60-932	13AC	1000		T2	
2	Progressive Music, Inc.	02/23/2014	725.00				CA	123-45-457	BRKFST	1000		T2	
			2,896.00	6		0							
			742,869.23	221		3							

Report Menu Name

Donations - Grouped By Donor Type - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show only totals and counts of donations by Donor Type.

02/14/2018 **Donations - Grouped By Donor Type - Summary** Page 1

All Donations

Donor Type	Description	Amount	Count	In-Kinds	Count
C	Corporation	444,264.23	52	0	0
F	Foundation	17,900.00	10	0	0
I	Individual	276,059.00	149	36.00	3
M	Memorial Record	1,750.00	4	0	0
O	Organization	2,896.00	6	0	0
		742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Donor Type With Calendar Year Totals And Counts

Description

Designed to be used with a Donation-based Selection Result, this report layout will show subtotals and donation counts for the current and past two calendar years by Donor Type.

02/14/2018 Donations - Grouped By Donor Type With Calendar Year Totals And Counts Page 1

All Donations

Donor Type	2018	2018	2017	2017	2016	2016
Corporation	550.00	2	51,200.00	4	113,000.00	5
Foundation	0.00	0	600.00	1	0.00	0
Individual	6,000.00	2	44,150.00	11	23,600.00	6
Memorial Record	0.00	0	500.00	1	0.00	0
Organization	0.00	0	0.00	0	0.00	0
	6,550.00	4	96,450.00	17	136,600.00	11

Report Menu Name

Donations - Grouped By Donor Type With Fiscal Year Totals And Counts

Description

Designed to be used with a Donation-based Selection Result, this report layout will show subtotals and donation counts for the current and past two fiscal years by Donor Type.

02/14/2018 Donations - Grouped By Donor Type With Fiscal Year Totals And Counts Page 1

All Donations

Donor Type	2018	2018	2017	2017	2016	2016
Corporation	$550.00	2	$164,200.00	9	$72,000.00	2
Foundation	$0.00	0	$600.00	1	$0.00	0
Individual	$19,800.00	7	$44,850.00	8	$22,100.00	11
Memorial Record	$0.00	0	$500.00	1	$0.00	0
Organization	$0.00	0	$0.00	0	$0.00	0
	$20,350.00	9	$210,150.00	19	$94,100.00	13

Report Menu Name

Donations - Grouped By Donor Type, Subtotaled by Donation Type

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and totals by Donor Type, and subtotals by Donation Type within each Donor Type. Within each Donor Type, donations are ordered by donor name.

02/14/2018 | **Donations - Grouped By Donor Type, Subtotaled by Donation Type** | Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Donor Type: C													
Donation Type:													
11	Decca Records	01/07/2018	50.00										
			50.00	1		0							
Donation Type: AE													
29	Northern Songs Limited,	04/01/2006	10,000.00				AE	123-45-456	06AC	1000		T1	Sample Donation
29	Northern Songs Limited,	05/01/2008	15,000.00				AE	123-45-456	08AC	1000		T1	Sample Donation
29	Northern Songs Limited,	06/12/2009	500.00				AE	123-45-456	09AC	1000		T1	Sample Donation
32	Intrepid Systems Inc.	11/17/2009	2,500.00				AE	123-45-456	09AC	1000		T1	
32	Intrepid Systems Inc.	03/26/2010	4,000.00				AE	123-45-456	10AC	1000		T1	
29	Northern Songs Limited,	06/01/2010	20,000.00				AE	123-45-456	10AC	1000		T1	Sample Donation
32	Intrepid Systems Inc.	02/18/2011	1,500.00				AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's donation
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-700	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
29	Northern Songs Limited,	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
29	Northern Songs Limited,	08/01/2012	40,000.00				AE	123-45-456	12AC	1000		T1	Sample Donation
29	Northern Songs Limited,	09/01/2014	50,000.00				AE	123-45-456	14AC	1000		T1	Sample Donation
29	Northern Songs Limited,	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited,	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			353,500.00	16		0							
Donation Type: CA													
32	Intrepid Systems Inc.	02/20/2007	900.00				CA	123-45-456	07AC	1000	APPEAL1	T1	
24	IBM Corporation	03/18/2012	1,234.56				CA	123-45-456	12AC	1000		TC	
32	Intrepid Systems Inc.	08/26/2012	3,000.00				CA	123-45-456	12AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
32	Intrepid Systems Inc.	02/19/2013	1,400.00				CA	123-45-456	13AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
24	IBM Corporation	03/17/2013	1,234.00				CA	123-50-937	UNSOL	1000		TC	
32	Intrepid Systems Inc.	05/29/2014	1,000.00				CA	123-45-456	14AC	1000	AM1	T1	
32	Intrepid Systems Inc.	08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
32	Intrepid Systems Inc.	03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
			16,768.56	9		0							

Report Menu Name

Donations - Grouped By Fiscal Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail grouped and totalled by Fiscal Year.

02/14/2018 **Donations - Grouped By Fiscal Year** **Page 7**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
15	Baker, Thomas	05/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
15	Baker, Thomas	06/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
			101,300.00	18		1							
Fiscal Year: 2016													
15	Baker, Thomas	07/07/2015	100.00				CK	123-50-937	15AC	1000		T1	
15	Baker, Thomas	08/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
32	Intrepid Systems Inc.	08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
15	Baker, Thomas	09/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
12	Hayward, Justin	09/26/2015	7,500.00				CA	123-45-456	15AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
15	Baker, Thomas	10/06/2015	100.00				CK	123-60-932	15AC	1000		T1	
15	Baker, Thomas	11/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
53	Musk, Elon	12/08/2015	5,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
15	Baker, Thomas	01/22/2016	2,500.00				CK	123-45-456	UNSOL	1000		T1	
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000		T1	
			94,100.00	13		0							
Fiscal Year: 2017													
12	Hayward, Justin	10/26/2016	8,000.00				CA	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
53	Musk, Elon	12/10/2016	6,500.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
7	Schmidt Aeronautic Foundatio	01/05/2017	600.00				CK	123-60-932	UNSOL	1000		T1	
17	Foster, James	01/30/2017	450.00				CK	123-60-932	17AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
53	Musk, Elon	03/10/2017	7,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here
			210,150.00	19		0							

Report Menu Name

Donations - Grouped By Fiscal Year + Appeal - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts by Fiscal Year and Donation Appeal.

02/14/2018 **Donations - Grouped By Fiscal Year + Appeal - Summary** Page 1

All Donations

Fiscal Year	Appeal	Amount	Count	Average
2003		3,010.00	4	752.50
2004		6,000.00	6	1,000.00
2007		500.00	1	500.00
2008		500.00	1	500.00
2009	APPEAL1	3,500.00	2	1,750.00
2010		2,500.00	1	2,500.00
2011	APPEAL1	4,200.00	4	1,050.00
2012		30,000.00	1	30,000.00
2012	APPEAL1	1,000.00	1	1,000.00
2012	APPEAL2	220.00	2	110.00
2013		49,790.00	13	3,830.00
2013	APPEAL1	3,000.00	1	3,000.00
2014		10,524.00	21	501.14
2014	APPEAL1	18,000.00	2	9,000.00
2015		67,608.00	5	13,521.60
2015	AM1	5,000.00	1	5,000.00
2015	APPEAL1	6,500.00	1	6,500.00
2016		70,500.00	6	11,750.00
2016	AM1	2,000.00	1	2,000.00
2016	APPEAL1	12,500.00	2	6,250.00
2017		108,000.00	4	27,000.00
2017	AM1	5,000.00	1	5,000.00
2017	APPEAL1	14,500.00	2	7,250.00
2018		800.00	1	800.00
2018	APPEAL1	13,000.00	4	3,250.00
1997		150.00	2	75.00
1998		200.00	1	200.00
1999		550.00	3	183.33
2000		600.00	1	600.00
2001		1,350.00	3	450.00
2002		1,600.00	2	800.00
2003		6,750.00	7	964.29
2004		5,500.00	4	1,375.00
2005		6,500.00	2	3,250.00
2006		10,050.00	2	5,025.00
2007		5,100.00	2	2,550.00
2007	APPEAL1	10,900.00	2	5,450.00
2008		15,250.00	3	5,083.33
2009		1,000.00	3	333.33
2009	APPEAL1	14,700.00	2	7,350.00
2010		24,800.00	4	6,200.00
2011		3,150.00	4	787.50
2011	APPEAL1	2,600.00	3	866.67
2011	APPEAL2	2,800.00	3	933.33

Report Menu Name

Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals, counts, and average gift amount by fiscal year and donation stimulus. Within year and stimulus, donations will be subtotaled and counted by donation TY (thank-you) code.

02/14/2018 **Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code** **Page 21**

All Donations

	Count	Amount	Average Gift
Fiscal Year and Stimulus: 2013 MUSIC			
Donation TY Code: T1			
		750.00	
	1	750.00	750.00
	1	750.00	750.00
Fiscal Year and Stimulus: 2013 UNSOL			
Donation TY Code: T1			
		750.00	
		1,000.00	
	2	1,750.00	875.00
Donation TY Code: TC			
		450.00	
		2,500.00	
		1,234.00	
	3	4,184.00	1,394.67
	5	5,934.00	1,186.80

Report Menu Name

Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code, Summary

Description

This is a summary version of the, "Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code", showing only totals.

02/14/2018 | Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code, Summary | Page 4

All Donations

	Count	Amount	Average Gift
Fiscal Year and Stimulus: 2014 13AC			
Donation TY Code: T1			
			100.00
	12	23,550.00	1,962.50
Donation TY Code: T2			
			890.00
	4	1,974.00	493.50
Donation TY Code: TC			
			1,500.00
	1	1,500.00	1,500.00
	17	27,024.00	1,589.65
Fiscal Year and Stimulus: 2014 MUSIC			
Donation TY Code: T1			
			60.00
	1	60.00	60.00
	1	60.00	60.00
Fiscal Year and Stimulus: 2014 UNSOL			
Donation TY Code: T1			
			432.00
	2	1,032.00	516.00

Report Menu Name

Donations - Grouped By Fiscal Year - Alternate Unit Donations - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals and counts for alternate unit (non-monetary) donations by fiscal year.

02/14/2018 **Donations - Grouped By Fiscal Year - Summary** Page 1

All Donations

Fiscal Year	Amount	Count	Average
2012	20.00	1	20.00
2014	8.00	1	8.00
2015	8.00	1	8.00
	36.00	3	12.00

Report Menu Name

Donations - Grouped By Fiscal Year - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show monetary totals, counts, and average gift amount by fiscal year.

02/14/2018 Donations - Grouped By Fiscal Year - Summary Page 1

All Donations

Fiscal Year	Amount	Count	Average
1997	150.00	2	75.00
1998	200.00	1	200.00
1999	550.00	3	183.33
2000	600.00	1	600.00
2001	1,350.00	3	450.00
2002	1,600.00	2	800.00
2003	9,760.00	11	887.27
2004	11,500.00	10	1,150.00
2005	6,500.00	2	3,250.00
2006	10,050.00	2	5,025.00
2007	16,500.00	5	3,300.00
2008	15,750.00	4	3,937.50
2009	19,200.00	7	2,742.86
2010	27,300.00	5	5,460.00
2011	12,750.00	14	910.71
2012	46,656.56	14	3,332.61
2013	99,551.67	44	2,262.54
2014	37,001.00	32	1,156.28
2015	101,300.00	18	5,627.78
2016	94,100.00	13	7,238.46
2017	210,150.00	19	11,060.53
2018	20,350.00	9	2,261.11
	742,869.23	221	3,361.40

Report Menu Name

Donations - Grouped By Fiscal Year and Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with totals and counts for each unique combination of fiscal year and donation stimulus.

02/14/2018 Donations - Grouped By Fiscal Year And Stimulus Page 13

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
32	Intrepid Systems Inc.	01/15/2018	500.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
			5,500.00	2		0							
Fiscal Year And Campaign: 2018: Annual Christmas Campaign													
53	Musk, Elon	12/15/2017	10,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			10,000.00	1		0							
Fiscal Year And Campaign: 2018: Science Endowment													
53	Musk, Elon	10/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	11/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	12/15/2017	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
53	Musk, Elon	01/15/2018	1,000.00				CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	
			4,000.00	4		0							
			742,869.23	221		3							

Report Menu Name

Donations - Grouped By Fund

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with totals and counts by donation fund.

02/14/2018 **Donations - Grouped By Fund** **Page 5**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
													here.
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here
53	Musk, Elon	12/15/2017	10,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
53	Musk, Elon	01/10/2018	5,000.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	01/15/2018	500.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
			665,867.23	198		3							
Fund: 2000													
7	Schmidt Aeronautic Foundatio	03/27/2013	4,000.00				CK	123-45-456	13AC	2000	APPEAL1	T1	
13	Lennon, John	11/14/2013	12,000.00				CA	123-45-456	13AC	2000	APPEAL1	T1	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
			16,500.00	3		0							
Fund: 3000													
20	Burke, James	02/13/2012	4,000.00				CK	123-45-457	UNSOL	3000		TC	
18	Bowie, Denise	04/06/2013	4,500.00				CK	123-50-937	BRKFST	3000		T2	
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000		T1	Example of soft credit donation
18	Bowie, Denise	03/09/2015	500.00				CK	123-60-932	15AC	3000		T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
			18,550.00	6		0							
Fund: 5000													
2	Progressive Music, Inc.	05/03/2012	222.00				CK	123-45-678	UNSOL	5000		TC	
3	Trek Foundation	09/19/2012	7,450.00				CA	123-70-MEM	UNSOL	5000		TC	
18	Bowie, Denise	03/23/2013	2,500.00				VC	123-70-MEM	UNSOL	5000		TC	CC# 1234 234 134 3453
20	Burke, James	05/17/2013	30.00				MC	123-45-678	13AC	5000		T1	Check #896
20	Burke, James	10/21/2013	200.00				CK	123-70-MEM	UNSOL	5000		T2	
10	Waters, Roger	11/24/2014	10,000.00				CA	123-50-937	UNSOL	5000		TC	Given in Honor of Mozart on his birthday.
23	Lodge, John	11/24/2014	7,500.00				VC		UNSOL	5000		T1	Given in Honor of Mozart on his birthday
18	Bowie, Denise	01/05/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		TC	
23	Lodge, John	01/23/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		T1	Soft Credit to Bach Memorial
			37,902.00	9		0							

Report Menu Name

Donations - Grouped By Fund - 1st Quarter Current and Previous 2 Years - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts for each donation fund for the first quarter of the current and previous two calendar years.

02/14/2018 Donations - Grouped By Fund - 1st Quarter Current and Previous 2 Years - Summary Page 1

All Donations

Donation Fund	Description	2018 Q1 Amount	2018 Count	2017 Q1 Amount	2017 Count	2016 Q1 Amount	2016 Count
		50.00	1	0.00	0	0.00	0
1000	Unrestricted Fund	5,500.00	2	72,750.00	7	9,000.00	3
2000	Building Fund	0.00	0	0.00	0	0.00	0
3000	Scholarship Fund	0.00	0	9,200.00	2	0.00	0
5000	Memorial Fund	0.00	0	0.00	0	0.00	0
STEMSTUD	Science, Technology, Engineering, Math Studies P	1,000.00	1	0.00	0	0.00	0
		6,550.00	4	81,950.00	9	9,000.00	3

Report Menu Name

Donations - Grouped By Fund - 2nd Quarter Current and Previous 2 Years - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts for each donation fund for the second quarter of the current and previous two calendar years.

02/14/2018 Donations - Grouped By Fund - 2nd Quarter Current and Previous 2 Years - Summary Page 1

All Donations

Donation Fund	Description	2018 Q2 Amount	2018 Count	2017 Q2 Amount	2017 Count	2016 Q2 Amount	2016 Count
		0.00	0	0.00	0	0.00	0
1000	Unrestricted Fund	0.00	0	200.00	2	100.00	1
2000	Building Fund	0.00	0	500.00	1	0.00	0
3000	Scholarship Fund	0.00	0	0.00	0	0.00	0
5000	Memorial Fund	0.00	0	0.00	0	0.00	0
STEMSTUD	Science, Technology, Engineering, Math Studies P	0.00	0	0.00	0	0.00	0
		0.00	0	700.00	3	100.00	1

Report Menu Name

Donations - Grouped By Fund - 3rd Quarter Current and Previous 2 Years - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts for each donation fund for the third quarter of the current and previous two calendar years.

02/14/2018 Donations - Grouped By Fund - 3rd Quarter Current and Previous 2 Years - Summary Page 1

All Donations

Donation Fund	Description	2018 Q3 Amount	2018 Count	2017 Q3 Amount	2017 Count	2016 Q3 Amount	2016 Count
		0.00	0	0.00	0	0.00	0
1000	Unrestricted Fund	0.00	0	0.00	0	0.00	0
2000	Building Fund	0.00	0	0.00	0	0.00	0
3000	Scholarship Fund	0.00	0	0.00	0	0.00	0
5000	Memorial Fund	0.00	0	0.00	0	0.00	0
STEMSTUD	Science, Technology, Engineering, Math Studies P	0.00	0	0.00	0	0.00	0
		0.00	0	0.00	0	0.00	0

Report Menu Name

Donations - Grouped By Fund - 4th Quarter Current and Previous 2 Years - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts for each donation fund for the fourth quarter of the current and previous two calendar years.

02/14/2018 Donations - Grouped By Fund - 4th Quarter Current and Previous 2 Years - Summary Page 1

All Donations

Donation Fund	Description	2018 Q4 Amount	2018 Count	2017 Q4 Amount	2017 Count	2016 Q4 Amount	2016 Count
		0.00	0	0.00	0	0.00	0
1000	Unrestricted Fund	0.00	0	10,800.00	2	127,500.00	7
2000	Building Fund	0.00	0	0.00	0	0.00	0
3000	Scholarship Fund	0.00	0	0.00	0	0.00	0
5000	Memorial Fund	0.00	0	0.00	0	0.00	0
STEMSTUD	Science, Technology, Engineering, Math Studies P	0.00	0	3,000.00	3	0.00	0
		0.00	0	13,800.00	5	127,500.00	7

Report Menu Name

Donations - Grouped By Fund - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show a total and count of donations by fund.

02/14/2018 **Donations - Grouped By Fund - Summary** **Page 1**

All Donations

Donation Fund	Description	Amount	Count	In-Kinds	Count
		50.00	1	0	0
1000	Unrestricted Fund	665,867.23	198	36.00	3
2000	Building Fund	16,500.00	3	0	0
3000	Scholarship Fund	18,550.00	6	0	0
5000	Memorial Fund	37,902.00	9	0	0
STEMSTUD	Science, Technology, Engineering, Math Studies	4,000.00	4	0	0
		742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Fund - Summary With Donation And Donor Counts

Description

Designed to be used with a Donation-based Selection Result, this report layout will show a total and count of donations by fund, and it will also show how many donors gave for each fund.

02/14/2018 **Donations - Grouped By Fund - Summary With Donation And Donor Counts** **Page 1**

All Donations

Fund	Description	Amount	Donation Count	Donor Count
		50.00	1	1
1000	Unrestricted Fund	665,903.23	201	23
2000	Building Fund	16,500.00	3	3
3000	Scholarship Fund	18,550.00	6	4
5000	Memorial Fund	37,902.00	9	6
STEMSTUD	Science, Technology, Engineering, Math Studies Program	4,000.00	4	1
		742,905.23	224	38

Report Menu Name

Donations - Grouped By Fund Code Description

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and totals grouped by the full description of each donation fund, rather than simply the fund code.

02/14/2018 **Donations - Grouped By Fund Code Description** **Page 1**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Fund:													
11	Decca Records	01/07/2018	50.00										
			50.00	1		0							
Fund: Building Fund													
7	Schmidt Aeronautic Foundatio	03/27/2013	4,000.00				CK	123-45-456	13AC	2000	APPEAL1	T1	
13	Lennon, John	11/14/2013	12,000.00				CA	123-45-456	13AC	2000	APPEAL1	T1	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
			16,500.00	3		0							
Fund: Memorial Fund													
2	Progressive Music, Inc.	05/03/2012	222.00				CK	123-45-678	UNSOL	5000		TC	
3	Trek Foundation	09/19/2012	7,450.00				CA	123-70-MEM	UNSOL	5000		TC	
18	Bowie, Denise	03/23/2013	2,500.00				VC	123-70-MEM	UNSOL	5000		TC	CC# 1234 234 134 3453
20	Burke, James	05/17/2013	30.00				MC	123-45-678	13AC	5000		T1	Check #896
20	Burke, James	10/21/2013	200.00				CK	123-70-MEM	UNSOL	5000		T2	
10	Waters, Roger	11/24/2014	10,000.00				CA	123-50-937	UNSOL	5000		TC	Given in Honor of Mozart on his birthday.
23	Lodge, John	11/24/2014	7,500.00				VC		UNSOL	5000		T1	Given in Honor of Mozart on his birthday
18	Bowie, Denise	01/05/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		TC	
23	Lodge, John	01/23/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		T1	Soft Credit to Bach Memorial
			37,902.00	9		0							
Fund: Scholarship Fund													
20	Burke, James	02/13/2012	4,000.00				CK	123-45-457	UNSOL	3000		TC	
18	Bowie, Denise	04/06/2013	4,500.00				CK	123-50-937	BRKFST	3000		T2	
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000		T1	Example of soft credit donation
18	Bowie, Denise	03/09/2015	500.00				CK	123-60-932	15AC	3000		T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
			18,550.00	6		0							

Report Menu Name

Donations - Grouped By Giver, Showing Soft Credit Recipient (If Any)

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail and both the name of the actual giver of each donation as well as the constituent receiving soft credit for the donation if the donation has been soft credited.

02/14/2018 Donations - Grouped By Giver, Showing Soft Credit Recipient (If Any) Page 7

All Donations

ID	Giving Entity	Date	Amount	Type	Stimulus	Fund	Appeal	Comment	Soft Credit Given To
7	Schmidt Aeronautic Foundation	01/05/2017	600.00	CK	UNSOL	1000			
		10/02/2013	600.00	CK	UNSOL	1000			
		03/27/2013	4,000.00	CK	13AC	2000	APPEAL1		
		03/27/2012	1,000.00	CK	12AC	1000			
		03/28/2011	500.00	CK	11AC	1000			
			6,700.00						
8	Scott, Montgomery	12/28/2010	1,000.00	CK	10AC	1000	APPEAL1		
			1,000.00						
26	Smith, John	12/03/2010	200.00	CA	10AC	1000	APPEAL1		
			200.00						
27	The Corporation For Public Broa	03/31/2017	50,000.00	CK	17AC	1000	APPEAL1		
			50,000.00						
3	Trek Foundation	01/31/2014	350.00	CK	14AC	3000		Example of soft credit donation	Thomas Baker
		11/30/2013	1,500.00	CK	13AC	1000			
		05/30/2013	1,500.00	CK	13AC	1000			
		09/19/2012	7,450.00	CA	UNSOL	5000			
		05/12/2011	400.00	AE	11AC	1000	APPEAL1	Sample Donation	
			11,200.00						
10	Waters, Roger	03/31/2017	4,000.00	CK	17AC	1000	APPEAL1		
		11/24/2014	10,000.00	CA	UNSOL	5000		Given in Honor of Mozart on his birthday.	Wolfgang Amadeus Mozart Mozart Memorial Account
		03/27/2013	4,000.00	CA	13AC	1000	APPEAL1		
		01/11/2013	750.00	VC	MUSIC	1000			
		02/05/2012	750.00	AE	12AC	1000			
		01/05/2012	750.00	AE	MUSIC	1000			
			20,250.00						
			742,869.23						

Report Menu Name

Donations - Grouped By Month, Subgrouped By Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals and counts for donation by month (regardless of year), and subtotals within each month by donation stimulus.

02/14/2018 **Donations - Grouped By Month, Subgrouped By Stimulus** **Page 6**

All Donations

Month	Stimulus	Amount	Count	In-Kinds	Count
September	13AC				
		800.00	1	0	0
September	14AC				
		55,000.00	2	0	0
September	15AC				
		7,600.00	2	0	0
September	UNSOL				
		7,950.00	2	0	0
		72,700.00	10	0	0
October	02AC				
		1,000.00	1	0	0
October	03AC				
		1,000.00	1	0	0
October	11AC				
		0.00	0	20.00	1
October	12AC				
		985.00	2	0	0
October	13AC				
		1,000.00	2	0	0
October	15AC				
		70,100.00	2	0	0

Report Menu Name

Donations - Grouped By Month/Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts subtotaled by month and year.

02/14/2018 | Donations - Grouped By Month/Year | Page 10

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
- October, 2012													
11	Decca Records	10/07/2012	150.00				CK	123-60-932	12AC	1000		T2	
4	Gore, Martin L.	10/11/2012	175.00				AE	123-70-MEM	UNSOL	1000		T1	
2	Progressive Music, Inc.	10/19/2012	835.00				CA	123-45-456	12AC	1000		T1	
			1,160.00	3		0							
- November, 2012													
11	Decca Records	11/08/2012	150.00				CK	123-60-932	12AC	1000		T1	
			150.00	1		0							
- December, 2012													
11	Decca Records	12/09/2012	150.00				CK	123-60-932	12AC	1000		T1	
23	Lodge, John	12/30/2012	300.00				CA	123-45-678	BRKFST	1000		T1	
			450.00	2		0							
- January, 2013													
28	Bach Memorial Account	01/04/2013	500.00				CA	123-45-456	13AC	1000	AM1	T1	
20	Burke, James	01/06/2013	450.00				VC	123-60-932	BRKFST	1000		T1	
20	Burke, James	01/09/2013	4,520.00				CK	123-60-932	BRKFST	1000		T2	
10	Waters, Roger	01/11/2013	750.00				VC	123-60-932	MUSIC	1000		T1	
15	Baker, Thomas	01/22/2013	750.00				CK	123-45-456	UNSOL	1000		T1	
21	Knight, Paula	01/22/2013	1,000.00				CK	123-45-456	UNSOL	1000		T1	
20	Burke, James	01/31/2013	800.00				VC	123-60-932	13AC	1000		T1	
			8,770.00	7		0							
- February, 2013													
28	Bach Memorial Account	02/04/2013	250.00				CA	123-45-456	13AC	1000	AM1	T1	
4	Gore, Martin L.	02/08/2013	100.00				VC	123-60-932	13AC	1000		T1	
32	Intrepid Systems Inc.	02/19/2013	1,400.00				CA	123-45-456	13AC	1000	APPEAL1	T1	Any general comment may be entered in the donation comment field
			1,750.00	3		0							

Report Menu Name

Donations - Grouped By Month/Year & Donor Type - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will just donation totals and counts for each unique year, month, and donor type combination.

02/14/2018 Donations - Grouped By Month/Year & Donor Type - Summary Page 1
All Donations

Month/Year	Donor Type	DT Code	Amount	Count	In-Kinds	Count
January, 1997	Individual	I	100.00	1	0	0
February, 1997	Individual	I	50.00	1	0	0
January, 1998	Individual	I	200.00	1	0	0
January, 1999	Corporation	C	100.00	1	0	0
January, 1999	Individual	I	400.00	1	0	0
February, 1999	Corporation	C	50.00	1	0	0
January, 2000	Individual	I	600.00	1	0	0
January, 2001	Corporation	C	400.00	1	0	0
January, 2001	Individual	I	750.00	1	0	0
February, 2001	Corporation	C	200.00	1	0	0
January, 2002	Corporation	C	600.00	1	0	0
January, 2002	Individual	I	1,000.00	1	0	0
October, 2002	Individual	I	1,000.00	1	0	0
November, 2002	Individual	I	10.00	1	0	0
December, 2002	Individual	I	2,000.00	2	0	0
January, 2003	Corporation	C	750.00	1	0	0
January, 2003	Individual	I	2,000.00	2	0	0
March, 2003	Individual	I	1,000.00	1	0	0
April, 2003	Individual	I	1,000.00	1	0	0
May, 2003	Individual	I	1,000.00	1	0	0
June, 2003	Individual	I	1,000.00	1	0	0
July, 2003	Individual	I	1,000.00	1	0	0
August, 2003	Individual	I	1,000.00	1	0	0
September, 2003	Individual	I	1,000.00	1	0	0
October, 2003	Individual	I	1,000.00	1	0	0
November, 2003	Individual	I	1,000.00	1	0	0
December, 2003	Individual	I	1,000.00	1	0	0
January, 2004	Corporation	C	1,000.00	1	0	0
January, 2004	Individual	I	4,500.00	3	0	0
January, 2005	Corporation	C	1,500.00	1	0	0
January, 2005	Individual	I	5,000.00	1	0	0
January, 2006	Individual	I	50.00	1	0	0
April, 2006	Corporation	C	10,000.00	1	0	0
December, 2006	Corporation	C	500.00	1	0	0
January, 2007	Individual	I	5,100.00	2	0	0
February, 2007	Corporation	C	900.00	1	0	0
March, 2007	Individual	I	10,000.00	1	0	0
September, 2007	Memorial Record	M	500.00	1	0	0
January, 2008	Individual	I	250.00	2	0	0
May, 2008	Corporation	C	15,000.00	1	0	0
December, 2008	Corporation	C	1,500.00	1	0	0
December, 2008	Individual	I	2,000.00	1	0	0
January, 2009	Individual	I	500.00	2	0	0
February, 2009	Individual	I	5,000.00	1	0	0
May, 2009	Individual	I	9,700.00	1	0	0
June, 2009	Corporation	C	500.00	1	0	0
November, 2009	Corporation	C	2,500.00	1	0	0
January, 2010	Individual	I	800.00	2	0	0
March, 2010	Corporation	C	4,000.00	1	0	0
June, 2010	Corporation	C	20,000.00	1	0	0
November, 2010	Individual	I	3,000.00	2	0	0
December, 2010	Individual	I	1,200.00	2	0	0
January, 2011	Corporation	C	1,500.00	1	0	0
January, 2011	Individual	I	1,150.00	2	0	0
February, 2011	Corporation	C	1,500.00	1	0	0
March, 2011	Foundation	F	500.00	1	0	0
April, 2011	Corporation	C	700.00	1	0	0
April, 2011	Individual	I	500.00	1	0	0

Report Menu Name

Donations - Grouped By Month/Year - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show just donation totals and counts for each unique calendar year and month combination.

02/14/2018 Donations - Grouped By Month/Year - Summary Page 1
All Donations

Month/Year	Amount	Count	In-Kinds	Count
January, 1997	100.00	1	0	0
February, 1997	50.00	1	0	0
January, 1998	200.00	1	0	0
January, 1999	500.00	2	0	0
February, 1999	50.00	1	0	0
January, 2000	600.00	1	0	0
January, 2001	1,150.00	2	0	0
February, 2001	200.00	1	0	0
January, 2002	1,600.00	2	0	0
October, 2002	1,000.00	1	0	0
November, 2002	10.00	1	0	0
December, 2002	2,000.00	2	0	0
January, 2003	2,750.00	3	0	0
March, 2003	1,000.00	1	0	0
April, 2003	1,000.00	1	0	0
May, 2003	1,000.00	1	0	0
June, 2003	1,000.00	1	0	0
July, 2003	1,000.00	1	0	0
August, 2003	1,000.00	1	0	0
September, 2003	1,000.00	1	0	0
October, 2003	1,000.00	1	0	0
November, 2003	1,000.00	1	0	0
December, 2003	1,000.00	1	0	0
January, 2004	5,500.00	4	0	0
January, 2005	6,500.00	2	0	0
January, 2006	50.00	1	0	0
April, 2006	10,000.00	1	0	0
December, 2006	500.00	1	0	0
January, 2007	5,100.00	2	0	0
February, 2007	900.00	1	0	0
March, 2007	10,000.00	1	0	0
September, 2007	500.00	1	0	0
January, 2008	250.00	2	0	0
May, 2008	15,000.00	1	0	0
December, 2008	3,500.00	2	0	0
January, 2009	500.00	2	0	0
February, 2009	5,000.00	1	0	0
May, 2009	9,700.00	1	0	0
June, 2009	500.00	1	0	0
November, 2009	2,500.00	1	0	0
January, 2010	800.00	2	0	0
March, 2010	4,000.00	1	0	0
June, 2010	20,000.00	1	0	0
November, 2010	3,000.00	2	0	0
December, 2010	1,200.00	2	0	0
January, 2011	2,650.00	3	0	0
February, 2011	1,500.00	1	0	0
March, 2011	500.00	1	0	0
April, 2011	1,200.00	2	0	0
May, 2011	2,700.00	3	0	0
July, 2011	30,000.00	1	0	0
September, 2011	200.00	1	0	0
October, 2011	0.00	0	20.00	1
December, 2011	1,000.00	1	0	0
January, 2012	2,350.00	3	0	0

Report Menu Name

Donations - Grouped By Organization Name And Account

Description

Designed to be used with a Donation-based Selection Result of organizational (non-individual) donors, this report layout will show donation detail with totals and counts for each organization, and a subtotal by donation account for each organization.

02/14/2018 | Donations - Grouped By Organization Name And Account | Page 1

Donations For Corporations & Organizations

Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
ORGANIZATION: 1984 Productions											
ACCOUNT: Cash Unrestricted											
04/20/2011	700.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
	700.00	1		0							
ACCOUNT: General Account											
02/08/2014	400.00				CK	123-60-932	14AC	1000		T1	
01/08/2014	350.00				CK	123-60-932	14AC	1000		T1	
12/11/2013	300.00				CK	123-60-932	13AC	1000		T1	
11/10/2013	250.00				CK	123-60-932	13AC	1000		T1	
	1,300.00	4		0							
	2,000.00	5		0							
ORGANIZATION: Bach Memorial Account											
ACCOUNT: Cash Unrestricted											
02/04/2013	250.00				CA	123-45-456	13AC	1000	AM1	T1	
01/04/2013	500.00				CA	123-45-456	13AC	1000	AM1	T1	
	750.00	2		0							
ACCOUNT: General Donations											
04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
	500.00	1		0							
	1,250.00	3		0							

Report Menu Name

Donations - Grouped By State

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amount and count subtotals by State. Donations will then be ordered by donor name within each state.

02/15/2018 **Donations - Grouped By State** Page 1

Donations For Corporations & Organizations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
State: California													
29	Northern Songs Limited, (U.S.	04/01/2006	10,000.00				AE	123-45-456	06AC	1000		T1	Sample Donation
5	Mozart Memorial Account	09/28/2007	500.00				CA	123-45-456	UNSOL	1000			
29	Northern Songs Limited, (U.S.	05/01/2008	15,000.00				AE	123-45-456	08AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	06/12/2009	500.00				AE	123-45-456	09AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	06/01/2010	20,000.00				AE	123-45-456	10AC	1000		T1	Sample Donation
7	Schmidt Aeronautic Foundatio	03/28/2011	500.00				CK	123-45-457	11AC	1000			
6	1984 Productions	04/20/2011	700.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
3	Trek Foundation	05/12/2011	400.00				AE	123-45-456	11AC	1000	APPEAL1	T1	Sample Donation
29	Northern Songs Limited, (U.S.	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
24	IBM Corporation	03/18/2012	1,234.56				CA	123-45-456	12AC	1000		TC	
7	Schmidt Aeronautic Foundatio	03/27/2012	1,000.00				CK	123-45-456	12AC	1000			
29	Northern Songs Limited, (U.S.	08/01/2012	40,000.00				AE	123-45-456	12AC	1000		T1	Sample Donation
11	Decca Records	09/06/2012	150.00				CK	123-60-932	12AC	1000		T1	
3	Trek Foundation	09/19/2012	7,450.00				CA	123-70-MEM	UNSOL	5000		TC	
11	Decca Records	10/07/2012	150.00				CK	123-60-932	12AC	1000		T2	
11	Decca Records	11/08/2012	150.00				CK	123-60-932	12AC	1000		T1	
11	Decca Records	12/09/2012	150.00				CK	123-60-932	12AC	1000		T1	
24	IBM Corporation	03/17/2013	1,234.00				CA	123-50-937	UNSOL	1000		TC	
7	Schmidt Aeronautic Foundatio	03/27/2013	4,000.00				CK	123-45-456	13AC	2000	APPEAL1	T1	
24	IBM Corporation	04/04/2013	12,345.67				CK	123-60-932	13AC	1000		T1	
3	Trek Foundation	05/30/2013	1,500.00				CK	123-60-932	13AC	1000		TC	
7	Schmidt Aeronautic Foundatio	10/02/2013	600.00				CK	123-60-932	UNSOL	1000		T1	
11	Decca Records	10/24/2013	200.00				IK		UNSOL	1000		TC	Peter brought in 200 lbs of food for our food drive.
6	1984 Productions	11/10/2013	250.00				CK	123-60-932	13AC	1000		T1	
3	Trek Foundation	11/30/2013	1,500.00				CK	123-60-932	13AC	1000		TC	
6	1984 Productions	12/11/2013	300.00				CK	123-60-932	13AC	1000		T1	
6	1984 Productions	01/08/2014	350.00				CK	123-60-932	14AC	1000		T1	
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000		T1	Example of soft credit donation
6	1984 Productions	02/08/2014	400.00				CK	123-60-932	14AC	1000		T1	
29	Northern Songs Limited, (U.S.	09/01/2014	50,000.00				AE	123-45-456	14AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
7	Schmidt Aeronautic Foundatio	01/05/2017	600.00				CK	123-60-932	UNSOL	1000		T1	
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
11	Decca Records	01/07/2018	50.00										
			429,564.23	38		0							

Report Menu Name

Donations - Grouped By State - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts for each state. This report does not filter by donation type so the selection you use with this report should either have only monetary donations, or alternate unit donations of a specific type.

02/15/2018 **Donations - Grouped By State - Summary** Page 1

Donations For Corporations & Organizations

State	Description	Amount	Count	In-Kinds	Count
CA	California	429,564.23	38	0	0
WA	Washington	37,246.00	34	0	0
		466,810.23	72	0	0

Report Menu Name

Donations - Grouped By Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with totals and counts for each Stimulus. Donations are subsorted in chronological order within each Stimulus.

02/15/2018 **Donations - Grouped By Stimulus** **Page 6**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
			82,850.00	12		0							
Stimulus: 18AC													
53	Musk, Elon	01/10/2018	5,000.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	01/15/2018	500.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
			5,500.00	2		0							
Stimulus: ACC													
53	Musk, Elon	12/08/2015	5,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	12/10/2016	6,500.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	12/15/2017	10,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			21,500.00	3		0							
Stimulus: BRKFST													
23	Lodge, John	12/30/2012	300.00				CA	123-45-678	BRKFST	1000		T1	
20	Burke, James	01/06/2013	450.00				VC	123-60-932	BRKFST	1000		T1	
20	Burke, James	01/09/2013	4,520.00				CK	123-60-932	BRKFST	1000		T2	
18	Bowie, Denise	04/06/2013	4,500.00				CK	123-50-937	BRKFST	3000		T2	
2	Progressive Music, Inc.	02/23/2014	725.00				CA	123-45-457	BRKFST	1000		T2	
			10,495.00	5		0							
Stimulus: MUSIC													
32	Intrepid Systems Inc.	01/25/1999	100.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	02/28/1999	50.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	01/24/2001	400.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	01/24/2002	600.00				CK	123-45-456	MUSIC	1000		T1	
10	Waters, Roger	01/05/2012	750.00				AE	123-45-456	MUSIC	1000		T1	
10	Waters, Roger	01/11/2013	750.00				VC	123-60-932	MUSIC	1000		T1	

Report Menu Name

Donations - Grouped By Stimulus - Code Description

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with totals and counts for each the full description of each Stimulus code. Donations are subsorted in chronological order within each Stimulus.

02/15/2018 | **Donations - Grouped By Stimulus - Code Descriptions** | **All Donations** | Page 6

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
32	Intrepid Systems Inc.												
		04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
			82,850.00	12		0							
Stimulus: 2018 Annual Campaign													
53	Musk, Elon	01/10/2018	5,000.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	01/15/2018	500.00				CK	123-45-456	18AC	1000	APPEAL1	T1	
			5,500.00	2		0							
Stimulus: Annual Christmas Campaign													
53	Musk, Elon	12/08/2015	5,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	12/10/2016	6,500.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
53	Musk, Elon	12/15/2017	10,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			21,500.00	3		0							
Stimulus: Breakfast Special Event													
23	Lodge, John	12/30/2012	300.00				CA	123-45-678	BRKFST	1000		T1	
20	Burke, James	01/06/2013	450.00				VC	123-60-932	BRKFST	1000		T1	
20	Burke, James	01/09/2013	4,520.00				CK	123-60-932	BRKFST	1000		T2	
18	Bowie, Denise	04/06/2013	4,500.00				CK	123-50-937	BRKFST	3000		T2	
2	Progressive Music, Inc.	02/23/2014	725.00				CA	123-45-457	BRKFST	1000		T2	
			10,495.00	5		0							
Stimulus: Music Festival													
32	Intrepid Systems Inc.	01/25/1999	100.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	02/28/1999	50.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	01/24/2001	400.00				CK	123-45-456	MUSIC	1000		T1	
32	Intrepid Systems Inc.	01/24/2002	600.00				CK	123-45-456	MUSIC	1000		T1	
10	Waters, Roger	01/05/2012	750.00				AE	123-45-456	MUSIC	1000		T1	
10	Waters, Roger	01/11/2013	750.00				VC	123-60-932	MUSIC	1000		T1	

Report Menu Name

Donations - Grouped By Stimulus - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show only donation amount totals and counts within each Stimulus.

02/15/2018 Donations - Grouped By Stimulus - Summary Page 1

All Donations

Stimulus Code	Description	Amount	Count	In-Kinds	Count
		50.00	1	0	0
01AC	2001 Annual Campaign	200.00	1	0	0
02AC	2002 Annual Campaign	3,010.00	4	0	0
03AC	2003 Annual Campaign	11,750.00	12	0	0
04AC	2004 Annual Campaign	3,000.00	3	0	0
05AC	2005 Annual Campaign	1,500.00	1	0	0
06AC	2006 Annual Campaign	10,500.00	2	0	0
07AC	2007 Annual Campaign	10,900.00	2	0	0
08AC	2008 Annual Campaign	18,500.00	3	0	0
09AC	2009 Annual Campaign	17,700.00	4	0	0
10AC	2010 Annual Campaign	28,200.00	6	0	0
11AC	2011 Annual Campaign	38,600.00	11	20.00	1
12AC	2012 Annual Campaign	53,749.56	17	0	0
13AC	2013 Annual Campaign	57,631.67	38	0	0
14AC	2014 Annual Campaign	65,860.00	11	0	0
15AC	2015 Annual Campaign	85,500.00	15	0	0
16AC	2016 Annual Campaign	127,600.00	9	0	0
17AC	2017 Annual Campaign	82,850.00	12	0	0
18AC	2018 Annual Campaign	5,500.00	2	0	0
ACC	Annual Christmas Campaign	21,500.00	3	0	0
BRKFST	Breakfast Special Event	10,495.00	5	0	0
MUSIC	Music Festival	2,710.00	7	0	0
SE	Science Endowment	4,000.00	4	0	0
UNSOL	Unsolicited	81,563.00	48	0	0
VOL	Volunteer Hours	0.00	0	16.00	2
		742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Stimulus - Summary With Averages

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show the donation total, count, and average amount for each Stimulus. The report will only include monetary donations.

02/15/2018 **Donations - Grouped By Stimulus - Summary With Averages** Page 1

All Donations

Stimulus Code	Description	Amount	Count	Average Gift
		50.00	1	50.00
01AC	2001 Annual Campaign	200.00	1	200.00
02AC	2002 Annual Campaign	3,010.00	4	752.50
03AC	2003 Annual Campaign	11,750.00	12	979.17
04AC	2004 Annual Campaign	3,000.00	3	1,000.00
05AC	2005 Annual Campaign	1,500.00	1	1,500.00
06AC	2006 Annual Campaign	10,500.00	2	5,250.00
07AC	2007 Annual Campaign	10,900.00	2	5,450.00
08AC	2008 Annual Campaign	18,500.00	3	6,166.67
09AC	2009 Annual Campaign	17,700.00	4	4,425.00
10AC	2010 Annual Campaign	28,200.00	6	4,700.00
11AC	2011 Annual Campaign	38,600.00	11	3,509.09
12AC	2012 Annual Campaign	53,749.56	17	3,161.74
13AC	2013 Annual Campaign	57,631.67	38	1,516.62
14AC	2014 Annual Campaign	65,860.00	11	5,987.27
15AC	2015 Annual Campaign	85,500.00	15	5,700.00
16AC	2016 Annual Campaign	127,600.00	9	14,177.78
17AC	2017 Annual Campaign	82,850.00	12	6,904.17
18AC	2018 Annual Campaign	5,500.00	2	2,750.00
ACC	Annual Christmas Campaign	21,500.00	3	7,166.67
BRKFST	Breakfast Special Event	10,495.00	5	2,099.00
MUSIC	Music Festival	2,710.00	7	387.14
SE	Science Endowment	4,000.00	4	1,000.00
UNSOL	Unsolicited	81,563.00	48	1,699.23
		742,869.23	221	3,361.40

Report Menu Name

Donations - Grouped By Stimulus And Donor - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals and counts for each donor within each stimulus.

02/15/2018 **Donations - Grouped By Stimulus And Donor - Summary** Page 1

All Donations

Donation Stimulus	Donor	Amount	Count
	Decca Records	50.00	1
01AC	Intrepid Systems Inc.	200.00	1
02AC	Hayward, Justin	3,010.00	4
03AC	Hayward, Justin	11,000.00	11
03AC	Intrepid Systems Inc.	750.00	1
04AC	Hayward, Justin	2,000.00	2
04AC	Intrepid Systems Inc.	1,000.00	1
05AC	Intrepid Systems Inc.	1,500.00	1
06AC	Intrepid Systems Inc.	500.00	1
06AC	Northern Songs Limited, (U.S. Division)	10,000.00	1
07AC	Hayward, Justin	10,000.00	1
07AC	Intrepid Systems Inc.	900.00	1
08AC	Hayward, Justin	2,000.00	1
08AC	Intrepid Systems Inc.	1,500.00	1
08AC	Northern Songs Limited, (U.S. Division)	15,000.00	1
09AC	Baker, Thomas	5,000.00	1
09AC	Hayward, Justin	9,700.00	1
09AC	Intrepid Systems Inc.	2,500.00	1
09AC	Northern Songs Limited, (U.S. Division)	500.00	1
10AC	Baker, Thomas	2,000.00	1
10AC	Hayward, Justin	1,000.00	1
10AC	Intrepid Systems Inc.	4,000.00	1
10AC	Northern Songs Limited, (U.S. Division)	20,000.00	1
10AC	Scott, Montgomery	1,000.00	1
10AC	Smith, John	200.00	1
11AC	1984 Productions	700.00	1
11AC	Baker, Thomas	500.00	2
11AC	Foster, James	500.00	1
11AC	Hayward, Justin	1,000.00	1
11AC	Intrepid Systems Inc.	5,000.00	3
11AC	Northern Songs Limited, (U.S. Division)	30,000.00	1
11AC	Schmidt Aeronautic Foundation	500.00	1
11AC	Trek Foundation	400.00	1
12AC	Baker, Thomas	500.00	1
12AC	Burke, James	400.00	1
12AC	Decca Records	600.00	4
12AC	Foster, James	100.00	2
12AC	Hayward, Justin	5,000.00	1
12AC	IBM Corporation	1,234.56	1
12AC	Intrepid Systems Inc.	3,000.00	1
12AC	Knight, Paula	100.00	1
12AC	Northern Songs Limited, (U.S. Division)	40,000.00	1
12AC	Progressive Music, Inc.	1,065.00	2
12AC	Schmidt Aeronautic Foundation	1,000.00	1

Report Menu Name

Donations - Grouped By Stimulus And Donor - Summary (for file output only)

Description

Designed to be used with a Donation-based Selection Result, this report layout serves as an example of how to format a report which is intended to be written to a file. It has only column headings and data rows, but no page headings, footers, or margins.

Stimulus	Giving Entity	Donation Amount	Count
01AC	Intrepid Systems Inc.	200.00	1
02AC	Hayward, Justin	10.00	1
03AC	Hayward, Justin	1000.00	1
03AC	Intrepid Systems Inc.	750.00	1
04AC	Hayward, Justin	1000.00	1
04AC	Intrepid Systems Inc.	1000.00	1
05AC	Intrepid Systems Inc.	1500.00	1
06AC	Intrepid Systems Inc.	500.00	1
06AC	Northern Songs Limited, (U.S. Division)	10000.00	1
07AC	Hayward, Justin	10000.00	1
07AC	Intrepid Systems Inc.	900.00	1
08AC	Hayward, Justin	2000.00	1
08AC	Intrepid Systems Inc.	1500.00	1
08AC	Northern Songs Limited, (U.S. Division)	15000.00	1
09AC	Baker, Thomas	5000.00	1
09AC	Hayward, Justin	9700.00	1
09AC	Intrepid Systems Inc.	2500.00	1
09AC	Northern Songs Limited, (U.S. Division)	500.00	1
10AC	Baker, Thomas	2000.00	1
10AC	Hayward, Justin	1000.00	1
10AC	Intrepid Systems Inc.	4000.00	1
10AC	Northern Songs Limited, (U.S. Division)	20000.00	1
10AC	Scott, Montgomery	1000.00	1
10AC	Smith, John	200.00	1
11AC	1984 Productions	700.00	1
11AC	Baker, Thomas	300.00	1
11AC	Foster, James	500.00	1
11AC	Hayward, Justin	1000.00	1
11AC	Intrepid Systems Inc.	1500.00	1
11AC	Northern Songs Limited, (U.S. Division)	30000.00	1
11AC	Schmidt Aeronautic Foundation	500.00	1
11AC	Trek Foundation	400.00	1
12AC	Baker, Thomas	500.00	1
12AC	Burke, James	400.00	1
12AC	Decca Records	150.00	1
12AC	Foster, James	50.00	1
12AC	Hayward, Justin	5000.00	1
12AC	IBM Corporation	1234.56	1
12AC	Intrepid Systems Inc.	3000.00	1
12AC	Knight, Paula	100.00	1
12AC	Northern Songs Limited, (U.S. Division)	40000.00	1
12AC	Progressive Music, Inc.	230.00	1
12AC	Schmidt Aeronautic Foundation	1000.00	1
12AC	Waters, Roger	750.00	1
13AC	1984 Productions	250.00	1

Report Menu Name

Donations - Grouped By Stimulus With Monthly Totals In Columns

Description

Designed to be used with a Donation-based Selection Result, this report layout will show total amounts and counts for each Stimulus, and it will also show total giving by month for each stimulus.

02/15/2018 Donations - Grouped By Stimulus With Monthly Totals In Columns Page 1

All Donations

Stimulus	Amount	Count	January	February	March	April	May	June	July	August	September	October	November	December
	50.00	1	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
01AC	200.00	1	0.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
02AC	3,010.00	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	10.00	2,000.00
03AC	11,750.00	12	1,750.00	0.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
04AC	3,000.00	3	3,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05AC	1,500.00	1	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
06AC	10,500.00	2	0.00	0.00	0.00	10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
07AC	10,900.00	2	0.00	900.00	10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
08AC	18,500.00	3	0.00	0.00	0.00	0.00	15,000.00	0.00	0.00	0.00	0.00	0.00	0.00	3,500.00
09AC	17,700.00	4	0.00	5,000.00	0.00	0.00	9,700.00	500.00	0.00	0.00	0.00	0.00	2,500.00	0.00
10AC	28,200.00	6	0.00	0.00	4,000.00	0.00	0.00	20,000.00	0.00	0.00	0.00	0.00	3,000.00	1,200.00
11AC	38,600.00	11	1,500.00	1,500.00	500.00	1,200.00	2,700.00	0.00	30,000.00	0.00	200.00	20.00	0.00	1,000.00
12AC	53,749.56	17	0.00	5,750.00	2,234.56	900.00	0.00	0.00	280.00	43,150.00	150.00	985.00	150.00	150.00
13AC	57,631.67	38	1,300.00	1,750.00	8,800.00	14,353.67	3,382.00	1,022.00	7,234.00	1,350.00	800.00	1,000.00	14,650.00	1,990.00
14AC	65,860.00	11	1,260.00	1,000.00	1,000.00	0.00	1,000.00	0.00	0.00	6,500.00	55,000.00	0.00	0.00	100.00
15AC	85,500.00	15	100.00	100.00	5,100.00	0.00	100.00	100.00	100.00	2,100.00	7,600.00	70,100.00	100.00	0.00
16AC	127,600.0	9	0.00	500.00	6,000.00	0.00	100.00	0.00	0.00	0.00	0.00	8,000.00	113,000.0	0.00
17AC	82,850.00	12	450.00	0.00	80,900.00	700.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	800.00
18AC	5,500.00	2	5,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
ACC	21,500.00	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21,500.00
BRKFST	10,495.00	5	4,970.00	725.00	0.00	4,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	300.00
MUSIC	2,710.00	7	2,600.00	50.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	60.00	0.00	0.00
SE	4,000.00	4	1,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	1,000.00
UNSOL	81,563.00	48	45,350.00	4,050.00	3,734.00	700.00	672.00	0.00	0.00	0.00	7,950.00	1,607.00	17,500.00	0.00
VOL	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00	8.00	0.00
	742,869.2	221	70,330.00	21,525.00	123,268.5	33,353.67	33,654.00	22,622.00	38,614.00	54,100.00	72,700.00	84,780.00	152,918.0	35,040.00

Report Menu Name

Donations - Grouped By Stimulus, Subgrouped By Appeal

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by Stimulus, and subtotaled by Appeal.

02/15/2018 **Donations - Grouped By Stimulus, Subgrouped By Appeal** Page 5
All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Stimulus: 11AC													
Appeal:													
32	Intrepid Systems Inc.	02/18/2011	1,500.00				AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's donation
7	Schmidt Aeronautic Foundatio	03/28/2011	500.00				CK	123-45-457	11AC	1000			
29	Northern Songs Limited, (U.S.	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
			32,000.00	3		0							
Appeal: APPEAL1													
32	Intrepid Systems Inc.	01/25/2011	1,500.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
6	1984 Productions	04/20/2011	700.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
3	Trek Foundation	05/12/2011	400.00				AE	123-45-456	11AC	1000	APPEAL1	T1	Sample Donation
12	Hayward, Justin	12/19/2011	1,000.00				AE	123-45-456	11AC	1000	APPEAL1	T1	
			3,600.00	4		0							
Appeal: APPEAL2													
17	Foster, James	04/20/2011	500.00				CA	123-45-456	11AC	1000	APPEAL2	T1	
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-700	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
15	Baker, Thomas	05/27/2011	300.00				AE	123-45-456	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	09/30/2011	200.00				AE	12345678901	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	10/20/2011			20.00		HR	123-45-456	11AC	1000	APPEAL2	T1	
			3,000.00	4		1							
			38,600.00	11		1							
Stimulus: 12AC													
Appeal:													
10	Waters, Roger	02/05/2012	750.00				AE	123-45-456	12AC	1000		T1	
24	IBM Corporation	03/18/2012	1,234.56				CA	123-45-456	12AC	1000		TC	
7	Schmidt Aeronautic Foundatio	03/27/2012	1,000.00				CK	123-45-456	12AC	1000			
20	Burke, James	04/11/2012	400.00				CK	123-60-932	12AC	1000		T2	
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000		TC	
17	Foster, James	07/29/2012	50.00				CA	123-60-932	12AC	1000		T1	
29	Northern Songs Limited, (U.S.	08/01/2012	40,000.00				AE	123-45-456	12AC	1000		T1	Sample Donation

Report Menu Name

Donations - Grouped By Stimulus, Subgrouped By Appeal - Code Descriptions

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by the Stimulus Code Description, and subtotaled by the Appeal Code Description.

02/15/2018 **Donations - Grouped By Stimulus, Subgrouped By Appeal - Code Descriptions** **Page 5**

All Donations

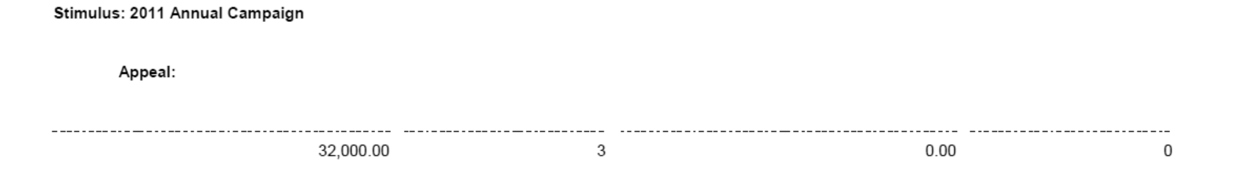
ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Stimulus: 2011 Annual Campaign													
Appeal:													
7	Schmidt Aeronautic Foundatio	03/28/2011	500.00				CK	123-45-457	11AC	1000			
29	Northern Songs Limited, (U.S.	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
32	Intrepid Systems Inc.	02/18/2011	1,500.00				AE	123-45-456	11AC	1000		T1	Comment for Brad Anderson's donation
			32,000.00	3		0							
Appeal: Appeal Mailing 1													
3	Trek Foundation	05/12/2011	400.00				AE	123-45-456	11AC	1000	APPEAL1	T1	Sample Donation
6	1984 Productions	04/20/2011	700.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
12	Hayward, Justin	12/19/2011	1,000.00				AE	123-45-456	11AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	01/25/2011	1,500.00				CK	123-45-456	11AC	1000	APPEAL1	T1	
			3,600.00	4		0							
Appeal: APPEAL2													
15	Baker, Thomas	10/20/2011			20.00		HR	123-45-456	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	09/30/2011	200.00				AE	12345678901	11AC	1000	APPEAL2	T1	
15	Baker, Thomas	05/27/2011	300.00				AE	123-45-456	11AC	1000	APPEAL2	T1	
17	Foster, James	04/20/2011	500.00				CA	123-45-456	11AC	1000	APPEAL2	T1	
32	Intrepid Systems Inc.	05/12/2011	2,000.00				AE	100-4010-700	11AC	1000	APPEAL2	T1	Example donation for previous month's donations report
			3,000.00	4		1							
			38,600.00	11		1							
Stimulus: 2012 Annual Campaign													
Appeal:													
2	Progressive Music, Inc.	10/19/2012	835.00				CA	123-45-456	12AC	1000		T1	
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000		TC	
7	Schmidt Aeronautic Foundatio	03/27/2012	1,000.00				CK	123-45-456	12AC	1000			
10	Waters, Roger	02/05/2012	750.00				AE	123-45-456	12AC	1000		T1	
11	Decca Records	12/09/2012	150.00				CK	123-60-932	12AC	1000		T1	
11	Decca Records	11/08/2012	150.00				CK	123-60-932	12AC	1000		T1	
11	Decca Records	10/07/2012	150.00				CK	123-60-932	12AC	1000		T2	
11	Decca Records	09/06/2012	150.00				CK	123-60-932	12AC	1000		T1	

Report Menu Name

Donations - Grouped By Stimulus, Subgrouped By Appeal - Code Descriptions - Summary

Description

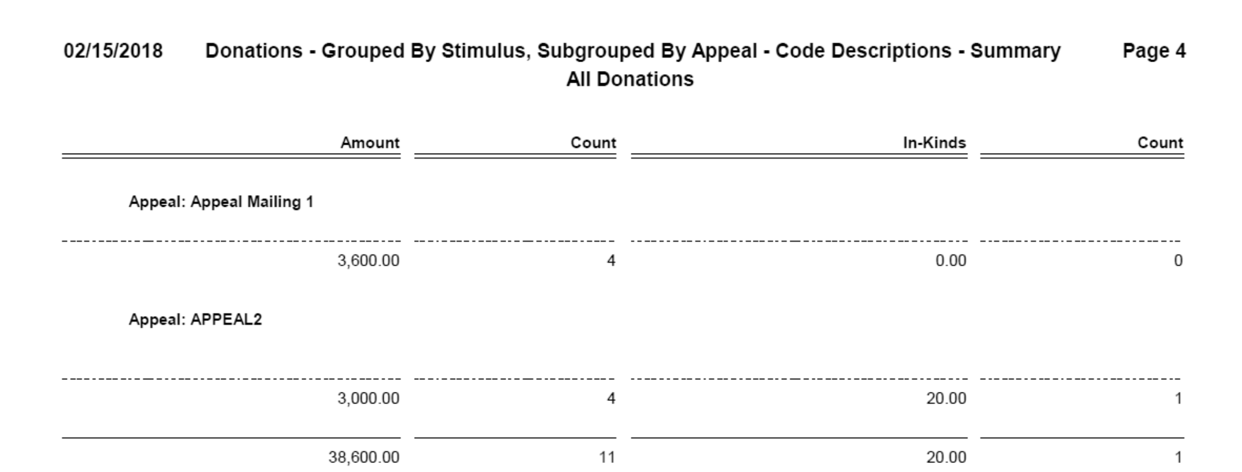
Designed to be used with a Donation-based Selection Result, this report layout will show only totals and counts by the Stimulus Code Description, and subtotaled by the Appeal Code Description.



Stimulus: 2011 Annual Campaign

Appeal:

32,000.00	3	0.00	0



02/15/2018 Donations - Grouped By Stimulus, Subgrouped By Appeal - Code Descriptions - Summary Page 4

All Donations

Amount	Count	In-Kinds	Count
Appeal: Appeal Mailing 1			
3,600.00	4	0.00	0
Appeal: APPEAL2			
3,000.00	4	20.00	1
38,600.00	11	20.00	1

Report Menu Name

Donations - Grouped By Stimulus, Subgrouped By Appeal - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show only totals and counts by the Stimulus Code, and subtotaled by Appeal Code.

Stimulus: 11AC

Appeal:

	Amount	Count	In-Kinds	Count
	32,000.00	3	0.00	0

02/15/2018 Donations - Grouped By Stimulus, Subgrouped By Appeal - Summary Page 4

All Donations

	Amount	Count	In-Kinds	Count
Appeal: APPEAL1				
	3,600.00	4	0.00	0
Appeal: APPEAL2				
	3,000.00	4	20.00	1
	38,600.00	11	20.00	1

Report Menu Name

Donations - Grouped By Stimulus, Subgrouped By Donation Type

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by Donation Stimulus, and subtotaled by the Donation Type.

02/15/2018 — **Donations - Grouped By Stimulus, Subgrouped By Donation Type** — **Page 9**

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Stimulus: 14AC													
Type: AE													
29	Northern Songs Limited, (U.S.	09/01/2014	50,000.00				AE	123-45-456	14AC	1000		T1	Sample Donation
			50,000.00	1		0							
Type: CA													
20	Burke, James	03/27/2014	1,000.00				CA	123-45-456	14AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	05/29/2014	1,000.00				CA	123-45-456	14AC	1000	AM1	T1	
12	Hayward, Justin	08/19/2014	6,500.00				CA	123-45-456	14AC	1000	APPEAL1	T1	
13	Lennon, John	09/25/2014	5,000.00				CA	123-45-456	14AC	1000	AM1	T1	My forms prevail
			13,500.00	4		0							
Type: CK													
6	1984 Productions	01/08/2014	350.00				CK	123-60-932	14AC	1000		T1	
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000		T1	Example of soft credit donation
6	1984 Productions	02/08/2014	400.00				CK	123-60-932	14AC	1000		T1	
20	Burke, James	02/08/2014	600.00				CK	123-60-932	14AC	1000		T1	
15	Baker, Thomas	12/07/2014	100.00				CK	123-50-937	14AC	1000		T1	
			1,800.00	5		0							
Type: VC													
4	Gore, Martin L.	01/06/2014	560.00				VC	123-60-932	14AC	1000		T1	
			560.00	1		0							
			65,860.00	11		0							
Stimulus: 15AC													
Type: AE													
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
			70,000.00	1		0							

Report Menu Name

Donations - Grouped By Stimulus, Subgrouped By Donor Name

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by Donation Stimulus, and subtotaled by Donor Name.

03/02/2018 **Donations - Grouped By Stimulus, Subsorted By Donor Name** Page 5

Monetary Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000		T1	Example of soft credit donation
			65,860.00	11		0							
Stimulus: 15AC													
15	Baker, Thomas	01/04/2015	100.00				CK	123-50-937	15AC	1000		T1	
		02/04/2015	100.00				CK	123-50-937	15AC	1000		T1	
		03/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		05/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		06/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		07/07/2015	100.00				CK	123-50-937	15AC	1000		T1	
		08/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		09/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		10/06/2015	100.00				CK	123-60-932	15AC	1000		T1	
		11/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
18	Bowie, Denise	03/09/2015	500.00				CK	123-60-932	15AC	3000		T1	
12	Hayward, Justin	09/26/2015	7,500.00				CA	123-45-456	15AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
53	Musk, Elon	03/15/2015	4,500.00				CK	123-45-456	15AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
			85,500.00	15		0							
Stimulus: 16AC													
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000		T1	
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
12	Hayward, Justin	10/26/2016	8,000.00				CA	123-45-456	16AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			127,600.00	9		0							
Stimulus: 17AC													
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
17	Foster, James	01/30/2017	450.00				CK	123-60-932	17AC	1000	APPEAL1	T1	
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.

Report Menu Name

Donations - Grouped By Stimulus, Subsorted By Amount

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by Donation Stimulus, and subsorted by Donation Amount.

03/02/2018 **Donations - Grouped By Stimulus, Subsorted By Amount** Page 5

Monetary Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Stimulus: 15AC													
15	Baker, Thomas	11/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		10/06/2015	100.00				CK	123-60-932	15AC	1000		T1	
		09/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		08/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		07/07/2015	100.00				CK	123-50-937	15AC	1000		T1	
		06/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		05/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		03/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		02/04/2015	100.00				CK	123-50-937	15AC	1000		T1	
		01/04/2015	100.00				CK	123-50-937	15AC	1000		T1	
18	Bowie, Denise	03/09/2015	500.00				CK	123-60-932	15AC	3000		T1	
32	Intrepid Systems Inc.	08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
53	Musk, Elon	03/15/2015	4,500.00				CK	123-45-456	15AC	1000	APPEAL1	T1	
12	Hayward, Justin	09/26/2015	7,500.00				CA	123-45-456	15AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
			85,500.00	15		0							
Stimulus: 16AC													
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000		T1	
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
12	Hayward, Justin	10/26/2016	8,000.00				CA	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			127,600.00	9		0							
Stimulus: 17AC													
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	17ACA1	T1	General Comment Goes Here
		04/25/2017	100.00				CK	123-45-456	17AC	1000	APPEAL1	BAS	General comment goes here
17	Foster, James	01/30/2017	450.00				CK	123-60-932	17AC	1000	APPEAL1	T1	
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
32	Intrepid Systems Inc.	03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
10	Waters, Roger	03/31/2017	4,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
53	Musk, Elon	03/10/2017	7,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.

Report Menu Name

Donations - Grouped By Stimulus, Subsorted By Donor Name

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by Donation Stimulus, and subsorted by Donor Name.

03/02/2018 Donations - Grouped By Stimulus, Subsorted By Donor Name Page 5

Monetary Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
3	Trek Foundation	01/31/2014	350.00				CK	123-50-937	14AC	3000		T1	Example of soft credit donation
			65,860.00	11		0							
Stimulus: 15AC													
15	Baker, Thomas	01/04/2015	100.00				CK	123-50-937	15AC	1000		T1	
		02/04/2015	100.00				CK	123-50-937	15AC	1000		T1	
		03/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		05/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		06/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		07/07/2015	100.00				CK	123-50-937	15AC	1000		T1	
		08/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		09/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
		10/06/2015	100.00				CK	123-60-932	15AC	1000		T1	
		11/06/2015	100.00				CK	123-50-937	15AC	1000		T1	
18	Bowie, Denise	03/09/2015	500.00				CK	123-60-932	15AC	3000		T1	
12	Hayward, Justin	09/26/2015	7,500.00				CA	123-45-456	15AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	08/31/2015	2,000.00				CA	123-45-456	15AC	1000	AM1	T1	General comment
53	Musk, Elon	03/15/2015	4,500.00				CK	123-45-456	15AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
			85,500.00	15		0							
Stimulus: 16AC													
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000		T1	
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
12	Hayward, Justin	10/26/2016	8,000.00				CA	123-45-456	16AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
		11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			127,600.00	9		0							
Stimulus: 17AC													
28	Bach Memorial Account	04/15/2017	500.00				CA	123-50-937	17AC	2000	APPEAL1	T1	
15	Baker, Thomas	03/31/2017	750.00				CA	123-45-678	17AC	3000	APPEAL1	T1	
18	Bowie, Denise	03/31/2017	8,450.00				CK	123-60-932	17AC	3000	APPEAL1	T1	
20	Burke, James	12/31/2017	800.00				VC	123-60-932	17AC	1000		T1	
17	Foster, James	01/30/2017	450.00				CK	123-60-932	17AC	1000	APPEAL1	T1	
12	Hayward, Justin	03/26/2017	9,700.00				CA	123-45-456	17AC	1000	APPEAL1	T1	Any general comment can go here.

Report Menu Name

Donations - Grouped By TY Code

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with amounts and counts totaled by the donation TY code description.

02/15/2018 | Donations - Grouped By TY Code | Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	TY	Comment
TY Code:												
5	Mozart Memorial Account	09/28/2007	500.00				CA	123-45-456	UNSOL	1000		
7	Schmidt Aeronautic Foundation	03/28/2011	500.00				CK	123-45-457	11AC	1000		
7	Schmidt Aeronautic Foundation	03/27/2012	1,000.00				CK	123-45-456	12AC	1000		
21	Knight, Paula	10/06/2013			8.00		HR		VOL	1000		Volunteered 8 hours with Christmas dinner setup.
11	Decca Records	01/07/2018	50.00									
			2,050.00	4		1						
TY Code: Basic Thank-You Letter For Donations From Non-Major Donors												
32	Intrepid Systems Inc.	04/25/2017	100.00				CK	123-45-456	17AC	1000	BAS	General comment goes here
			100.00	1		0						
TY Code: Customized Thank-You Letter												
20	Burke, James	02/13/2012	4,000.00				CK	123-45-457	UNSOL	3000	TC	
24	IBM Corporation	03/18/2012	1,234.56				CA	123-45-456	12AC	1000	TC	
2	Progressive Music, Inc.	05/03/2012	222.00				CK	123-45-678	UNSOL	5000	TC	
2	Progressive Music, Inc.	07/12/2012	230.00				DC	123-50-937	12AC	1000	TC	
3	Trek Foundation	09/19/2012	7,450.00				CA	123-70-MEM	UNSOL	5000	TC	
24	IBM Corporation	03/17/2013	1,234.00				CA	123-50-937	UNSOL	1000	TC	
18	Bowie, Denise	03/23/2013	2,500.00				VC	123-70-MEM	UNSOL	5000	TC	CC# 1234 234 134 3453
17	Foster, James	05/03/2013	450.00				CK	123-60-932	UNSOL	1000	TC	
20	Burke, James	05/15/2013	100.00				VC	123-45-678	13AC	1000	TC	Check #254
3	Trek Foundation	05/30/2013	1,500.00				CK	123-60-932	13AC	1000	TC	
11	Decca Records	10/24/2013	200.00				IK		UNSOL	1000	TC	Peter brought in 200 lbs of food for our food drive.
3	Trek Foundation	11/30/2013	1,500.00				CK	123-60-932	13AC	1000	TC	
26	Smith, John	11/22/2014			8.00		HR		VOL	1000	TC	Volunteered 8 hrs.
10	Waters, Roger	11/24/2014	10,000.00				CA	123-50-937	UNSOL	5000	TC	Given in Honor of Mozart on his birthday.
18	Bowie, Denise	01/05/2015	5,000.00				CA	123-70-MEM	UNSOL	5000	TC	
23	Lodge, John	04/05/2015	700.00				CA	123-60-932	UNSOL	1000	TC	
			36,320.56	15		1						
TY Code: General Thank-You Form Letter 1												
12	Hayward, Justin	01/25/1997	100.00				CK	123-45-456	UNSOL	1000	T1	
12	Hayward, Justin	02/28/1997	50.00				CK	123-45-456	UNSOL	1000	T1	
12	Hayward, Justin	01/25/1998	200.00				CK	123-45-456	UNSOL	1000	T1	
12	Hayward, Justin	01/25/1999	400.00				CK	123-45-456	UNSOL	1000	T1	
32	Intrepid Systems Inc.	01/25/1999	100.00				CK	123-45-456	MUSIC	1000	T1	
32	Intrepid Systems Inc.	02/28/1999	50.00				CK	123-45-456	MUSIC	1000	T1	
12	Hayward, Justin	01/25/2000	600.00				CK	123-45-456	UNSOL	1000	T1	

Report Menu Name

Donations - Grouped By TY Code- Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show just donation totals and counts for each donation TY code.

02/15/2018 **Donations - Grouped By TY Code - Summary** Page 1

All Donations

TY Code	Description	Amount	Count	In-Kinds	Count
		2,050.00	4	8.00	1
BASICTHANK	Basic Thank-You Letter For Donations From Non-	100.00	1	0	0
T1	General Thank-You Form Letter 1	636,207.67	181	20.00	1
T2	General Thank-You Form Letter 2	68,191.00	20	0	0
TC	Customized Thank-You Letter	36,320.56	15	8.00	1
		742,869.23	221	36.00	3

Report Menu Name

Donations - Grouped By Year + Stimulus, Subgrouped by TY code

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals by donation Year and Stimulus, and subtotals by donation TY code.

02/15/2018 **Donations - Grouped By Year + Stimulus, Subgrouped by TY code** Page 6

All Donations

	Count	Amount	Average Gift
Year and Stimulus: 2007 UNSOL			
Donation TY Code:			
		500.00	
	1	500.00	500.00
Donation TY Code: T1			
		5,000.00	
		100.00	
	2	5,100.00	2,550.00
	3	5,600.00	1,866.67
Year and Stimulus: 2008 08AC			
Donation TY Code: T1			
		2,000.00	
		15,000.00	
		1,500.00	
	3	18,500.00	6,166.67
	3	18,500.00	6,166.67

Report Menu Name

Donations - Grouped By Year + Stimulus, Subgrouped by TY code - Summary

Description

Just the totals from the, "Donations - Grouped By Year + Stimulus, Subgrouped by TY code" shown above.

03/02/2018 **Donations - Grouped By Year + Stimulus, Subgrouped by TY code - Summary** **Page 8**

Monetary Donations

	Count	Amount	Average Gift
Year and Stimulus: 2012 12AC			
Donation TY Code:			
			1,000.00
	1	1,000.00	1,000.00
Donation TY Code: T1			
			100.00
	11	50,685.00	4,607.73
Donation TY Code: T2			
			400.00
	3	600.00	200.00
Donation TY Code: TC			
			230.00
	2	1,464.56	732.28
	17	53,749.56	3,161.74

Report Menu Name

Donations - Grouped By Year and Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with total amounts and counts by year and donation stimulus description.

02/15/2018 — Donations - Grouped By Year And Stimulus — Page 10

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Year And Campaign: 2015: Annual Christmas Campaign													
53	Musk, Elon	12/08/2015	5,000.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			5,000.00	1		0							
Year And Campaign: 2015: Unsolicited													
18	Bowie, Denise	01/05/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		TC	
15	Baker, Thomas	01/22/2015	1,000.00				CK	123-45-456	UNSOL	1000		T1	
21	Knight, Paula	01/23/2015	5,000.00				CK	123-45-456	UNSOL	1000		T1	
23	Lodge, John	01/23/2015	5,000.00				CA	123-70-MEM	UNSOL	5000		T1	Soft Credit to Bach Memorial
23	Lodge, John	04/05/2015	700.00				CA	123-60-932	UNSOL	1000		TC	
			16,700.00	5		0							
Year And Campaign: 2016: 2016 Annual Campaign													
20	Burke, James	02/24/2016	500.00				CK	123-45-678	16AC	1000		T2	
53	Musk, Elon	03/29/2016	6,000.00				CK	123-45-456	16AC	1000	APPEAL1	T1	
15	Baker, Thomas	05/10/2016	100.00				CK	123-50-937	16AC	1000		T1	
12	Hayward, Justin	10/26/2016	8,000.00				CA	123-45-456	16AC	1000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
32	Intrepid Systems Inc.	11/15/2016	5,000.00				CA	123-45-456	16AC	1000	AM1	T1	
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			127,600.00	9		0							
Year And Campaign: 2016: Annual Christmas Campaign													
53	Musk, Elon	12/10/2016	6,500.00				CK	123-45-456	ACC	1000	APPEAL1	T1	
			6,500.00	1		0							
Year And Campaign: 2016: Unsolicited													
15	Baker, Thomas	01/22/2016	2,500.00				CK	123-45-456	UNSOL	1000		T1	
			2,500.00	1		0							
Year And Campaign: 2017: 2017 Annual Campaign													
17	Foster, James	01/30/2017	450.00				CK	123-60-932	17AC	1000	APPEAL1	T1	
32	Intrepid Systems Inc.	03/04/2017	1,000.00				CA	123-45-456	17AC	1000	APPEAL1	T1	General Comment goes here
53	Musk, Elon	03/10/2017	7,000.00				CK	123-45-456	17AC	1000	APPEAL1	T1	

Report Menu Name

Donations - Grouped By Year With Donor Name, Amount, Stimulus

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donations amounts by donor, and it will subtotal by calendar year for each donor.

02/15/2018 **Donations - Grouped By Year With Donor Name, Amount, Stimulus** **Page 1**

All Donations

Giving Entity	Date	Amount	Stimulus
1984 Productions	04/20/2011	700.00	11AC - 2011 Annual Campaign
		700.00	
	12/11/2013	300.00	13AC - 2013 Annual Campaign
	11/10/2013	250.00	13AC - 2013 Annual Campaign
		550.00	
	02/08/2014	400.00	14AC - 2014 Annual Campaign
	01/08/2014	350.00	14AC - 2014 Annual Campaign
		750.00	
Bach Memorial Account	02/04/2013	250.00	13AC - 2013 Annual Campaign
	01/04/2013	500.00	13AC - 2013 Annual Campaign
		750.00	
	04/15/2017	500.00	17AC - 2017 Annual Campaign
		500.00	
Baker, Thomas	01/25/2007	5,000.00	UNSOL - Unsolicited
		5,000.00	
	01/22/2008	50.00	UNSOL - Unsolicited
		50.00	
	02/19/2009	5,000.00	09AC - 2009 Annual Campaign
	01/22/2009	100.00	UNSOL - Unsolicited
		5,100.00	
	11/20/2010	2,000.00	10AC - 2010 Annual Campaign
	01/22/2010	200.00	UNSOL - Unsolicited
		2,200.00	

Report Menu Name

Donations - Grouped By Zip Code

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation detail with total amounts and counts for each zip code. All digits of the zip code are considered.

02/15/2018 Donations - Grouped By Zip Code Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Count	In-Kinds	Count	Type	Account	Stimulus	Fund	Appeal	TY	Comment
Zip: 12345													
8	Scott, Montgomery	12/28/2010	1,000.00				CK	123-45-456	10AC	1000	APPEAL1	T1	
			1,000.00	1		0							
Zip: 92104													
5	Mozart Memorial Account	09/28/2007	500.00				CA	123-45-456	UNSOL	1000			
			500.00	1		0							
Zip: 94161-2323													
29	Northern Songs Limited, (U.S.	04/01/2006	10,000.00				AE	123-45-456	06AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	05/01/2008	15,000.00				AE	123-45-456	08AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	06/12/2009	500.00				AE	123-45-456	09AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	06/01/2010	20,000.00				AE	123-45-456	10AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	07/01/2011	30,000.00				AE	123-45-456	11AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	08/01/2012	40,000.00				AE	123-45-456	12AC	1000		T1	Sample Donation
13	Lennon, John	11/14/2013	12,000.00				CA	123-45-456	13AC	2000	APPEAL1	T1	
29	Northern Songs Limited, (U.S.	09/01/2014	50,000.00				AE	123-45-456	14AC	1000		T1	Sample Donation
13	Lennon, John	09/25/2014	5,000.00				CA	123-45-456	14AC	1000	AM1	T1	My forms prevail
29	Northern Songs Limited, (U.S.	10/01/2015	70,000.00				AE	123-45-456	15AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/01/2016	25,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/02/2016	45,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/03/2016	24,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
29	Northern Songs Limited, (U.S.	11/20/2016	14,000.00				AE	123-45-456	16AC	1000		T1	Sample Donation
			360,500.00	14		0							
Zip: 94175													
27	The Corporation For Public Br	03/31/2017	50,000.00				CK	123-60-932	17AC	1000	APPEAL1	T2	
			50,000.00	1		0							
Zip: 94300-2112													
11	Decca Records	09/06/2012	150.00				CK	123-60-932	12AC	1000		T1	
11	Decca Records	10/07/2012	150.00				CK	123-60-932	12AC	1000		T2	
11	Decca Records	11/08/2012	150.00				CK	123-60-932	12AC	1000		T1	
11	Decca Records	12/09/2012	150.00				CK	123-60-932	12AC	1000		T1	
11	Decca Records	10/24/2013	200.00				IK		UNSOL	1000		TC	Peter brought in 200 lbs of
11	Decca Records												food for our food drive.
		01/07/2018	50.00										
			850.00	6		0							

Report Menu Name

Donations - Grouped By Zip Code - Summary

Description

Designed to be used with a Donation-based Selection Result, this report layout will show just totals and counts by zip code. All digits of the zip code are considered.

02/15/2018 **Donations - Grouped By Zip Code - Summary** **Page 1**

All Donations

Zip	Amount	Count	In-Kinds	Count
12345	1,000.00	1	0	0
92104	500.00	1	0	0
94161-2323	360,500.00	14	0	0
94175	50,000.00	1	0	0
94300-2112	850.00	6	0	0
94304-7899	24,014.00	29	0	0
94403	20,450.00	7	8.00	1
94538	48,000.00	11	0	0
95070-1234	6,700.00	5	0	0
95070-3212	3,625.00	11	0	0
95112-3211	21,550.00	28	20.00	1
95119-2312	20,950.00	5	0	0
95131-1234	14,814.23	3	0	0
95133-4333	11,800.00	12	8.00	1
95991-3171	13,500.00	4	0	0
96067-1234	11,200.00	5	0	0
97401	2,160.00	6	0	0
98109	128,360.00	66	0	0
98109-1234	2,896.00	6	0	0
	742,869.23	221	36.00	3

Report Menu Name

Donations - Number of DONORS Giving To Each Campaign

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will count the number of donors giving to each campaign (stimulus) code.

02/15/2018 **Donations - Number of DONORS Giving To Each Campaign** Page 1

All Donations

Donation Stimulus	Description	Donor Count
		1
01AC	2001 Annual Campaign	1
02AC	2002 Annual Campaign	1
03AC	2003 Annual Campaign	2
04AC	2004 Annual Campaign	2
05AC	2005 Annual Campaign	1
06AC	2006 Annual Campaign	2
07AC	2007 Annual Campaign	2
08AC	2008 Annual Campaign	3
09AC	2009 Annual Campaign	4
10AC	2010 Annual Campaign	6
11AC	2011 Annual Campaign	8
12AC	2012 Annual Campaign	12
13AC	2013 Annual Campaign	14
14AC	2014 Annual Campaign	9
15AC	2015 Annual Campaign	6
16AC	2016 Annual Campaign	6
17AC	2017 Annual Campaign	10
18AC	2018 Annual Campaign	2
ACC	Annual Christmas Campaign	1
BRKFST	Breakfast Special Event	4
MUSIC	Music Festival	3
SE	Science Endowment	1
UNSOL	Unsolicited	15
		116

Report Menu Name

Donations - Pledge Payments For Calendar Year, 1 Year Ago

Description

Designed to be run directly or used with a Donation-based Selection Result of donations applied as pledge payments, this report layout will show the pledge to which each donation has been applied as a payment.

02/15/2018 — Donations - Pledge Payments For Calendar Year, 1 Year Ago — Page 1

Donations Given Previous Year Which Are Pledge Payments

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Total Paid	Pay Date	Pay Amount	Pay Type	Pay Stimulus	Pay Fund
18	Bowie, Denise	1	04/11/1999	6,000.00	8,950.00	03/31/2017	8,450.00	CK	17AC	3000
							8,450.00			
20	Burke, James	1	03/05/1998	9,600.00	9,600.00	12/31/2017	800.00	VC	17AC	1000
							800.00			
53	Musk, Elon	1	10/01/2017	12,000.00	4,000.00	12/15/2017	1,000.00	CK	SE	STEMSTUD
		1	10/01/2017	12,000.00	4,000.00	11/15/2017	1,000.00	CK	SE	STEMSTUD
		1	10/01/2017	12,000.00	4,000.00	10/15/2017	1,000.00	CK	SE	STEMSTUD
							3,000.00			
7	Schmidt Aeronautic Foundation	1	06/05/1998	2,400.00	1,200.00	01/05/2017	600.00	CK	UNSOL	1000
							600.00			
							12,850.00			

Report Menu Name

Donations - Pledge Payments For Previous Month

Description

Designed to be run directly or used with a Donation-based Selection Result of donations applied as pledge payments, this report layout will show the pledge to which each donation has been applied as a payment.

02/15/2018 Donations - Pledge Payments For Previous Month Page 1

Donations Given Previous Month Which Are Pledge Payments

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Total Paid	Pay Date	Pay Amount	Pay Type	Pay Stimulus	Pay Fund
53	Musk, Elon	1	10/01/2017	12,000.00	4,000.00	01/15/2018	1,000.00	CK	SE	STEMSTUD
							1,000.00			
							1,000.00			

Report Menu Name

Donations - Previous Month Only

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show and subtotal all donations made available to the report by the donor to which they belong. If you run this report directly, it will automatically run a selection to find all the donations given in the previous month.

02/15/2018 **Donations - Previous Month Only** **Page 1**

Donations Given Previous Month

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY Code	TY Value	Comment
11	Decca Records	01/07/2018	50.00							0.00	
			50.00								
32	Intrepid Systems Inc.	01/15/2018	500.00	CK	123-45-456	18AC	1000	APPEAL1	T1	0.00	
			500.00								
53	Musk, Elon	01/15/2018	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	0.00	
		01/10/2018	5,000.00	CK	123-45-456	18AC	1000	APPEAL1	T1	0.00	
			6,000.00								
			6,550.00								

Report Menu Name

Donations - Previous Year Only

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show and subtotal all donations made available to the report by the donor to which they belong. If you run this report directly, it will automatically run a selection to find all the donations given in the previous calendar year.

02/15/2018 **Donations - Previous Year Only** **Page 1**

Donations Given Previous Year

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY Code	TY Value	Comment
28	Bach Memorial Account	04/15/2017	500.00	CA	123-50-937	17AC	2000	APPEAL1	T1	0.00	
			500.00								
15	Baker, Thomas	03/31/2017	750.00	CA	123-45-678	17AC	3000	APPEAL1	T1	0.00	
			750.00								
18	Bowie, Denise	03/31/2017	8,450.00	CK	123-60-932	17AC	3000	APPEAL1	T1	0.00	
			8,450.00								
20	Burke, James	12/31/2017	800.00	VC	123-60-932	17AC	1000		T1	0.00	
			800.00								
17	Foster, James	01/30/2017	450.00	CK	123-60-932	17AC	1000	APPEAL1	T1	0.00	
			450.00								
12	Hayward, Justin	03/26/2017	9,700.00	CA	123-45-456	17AC	1000	APPEAL1	T1	0.00	Any general comment can go here.
			9,700.00								
32	Intrepid Systems Inc.	03/04/2017	1,000.00	CA	123-45-456	17AC	1000	APPEAL1	T1	0.00	General Comment goes here
		04/25/2017	100.00	CK	123-45-456	17AC	1000	APPEAL1	BASIC	0.00	General comment goes here
		04/25/2017	100.00	CK	123-45-456	17AC	1000	17ACA1	T1	0.00	General Comment Goes Here
			1,200.00								
53	Musk, Elon	12/15/2017	10,000.00	CK	123-45-456	ACC	1000	APPEAL1	T1	0.00	
		12/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	0.00	
		11/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	0.00	
		10/15/2017	1,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	0.00	
		03/10/2017	7,000.00	CK	123-45-456	17AC	1000	APPEAL1	T1	0.00	
			20,000.00								
7	Schmidt Aeronautic Foundation	01/05/2017	600.00	CK	123-60-932	UNSOL	1000		T1	0.00	
			600.00								
27	The Corporation For Public Broadcas	03/31/2017	50,000.00	CK	123-60-932	17AC	1000	APPEAL1	T2	0.00	
			50,000.00								
10	Waters, Roger	03/31/2017	4,000.00	CK	123-45-456	17AC	1000	APPEAL1	T1	0.00	
			4,000.00								

Report Menu Name

Donations - Quarterly Giving Totals By Calendar Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show quarterly totals by calendar year for all donations of the selection, and also show a total for each year.

02/15/2018 Donations - Quarterly Giving Totals By Calendar Year Page 1
Universal Qualification

Year	January - March	April - June	July - September	October - December	Total For Year
1997	150.00	0.00	0.00	0.00	150.00
1998	200.00	0.00	0.00	0.00	200.00
1999	550.00	0.00	0.00	0.00	550.00
2000	600.00	0.00	0.00	0.00	600.00
2001	1,350.00	0.00	0.00	0.00	1,350.00
2002	1,600.00	0.00	0.00	3,010.00	4,610.00
2003	3,750.00	3,000.00	3,000.00	3,000.00	12,750.00
2004	5,500.00	0.00	0.00	0.00	5,500.00
2005	6,500.00	0.00	0.00	0.00	6,500.00
2006	50.00	10,000.00	0.00	500.00	10,550.00
2007	16,000.00	0.00	500.00	0.00	16,500.00
2008	250.00	15,000.00	0.00	3,500.00	18,750.00
2009	5,500.00	10,200.00	0.00	2,500.00	18,200.00
2010	4,800.00	20,000.00	0.00	4,200.00	29,000.00
2011	4,650.00	3,900.00	30,200.00	1,000.00	39,750.00
2012	14,334.56	1,122.00	51,030.00	1,760.00	68,246.56
2013	23,054.00	23,707.67	9,384.00	19,132.00	75,277.67
2014	7,485.00	1,000.00	61,500.00	17,600.00	87,585.00
2015	21,300.00	900.00	9,800.00	75,200.00	107,200.00
2016	9,000.00	100.00	0.00	127,500.00	136,600.00
2017	81,950.00	700.00	0.00	13,800.00	96,450.00
2018	6,550.00	0.00	0.00	0.00	6,550.00
	215,123.56	89,629.67	165,414.00	272,702.00	742,869.23

Report Menu Name

Donations - Quarterly Giving Totals By Fiscal Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show quarterly totals by fiscal year for all donations of the selection, and also show a total for each year.

02/15/2018 Donations - Quarterly Giving Totals By Fiscal Year Page 1

Universal Qualification

Fiscal Year	January - March	April - June	July - September	October - December	Total For Year
1997	150.00	0.00	0.00	0.00	150.00
1998	200.00	0.00	0.00	0.00	200.00
1999	550.00	0.00	0.00	0.00	550.00
2000	600.00	0.00	0.00	0.00	600.00
2001	1,350.00	0.00	0.00	0.00	1,350.00
2002	1,600.00	0.00	0.00	0.00	1,600.00
2003	3,750.00	3,000.00	0.00	3,010.00	9,760.00
2004	5,500.00	0.00	3,000.00	3,000.00	11,500.00
2005	6,500.00	0.00	0.00	0.00	6,500.00
2006	50.00	10,000.00	0.00	0.00	10,050.00
2007	16,000.00	0.00	0.00	500.00	16,500.00
2008	250.00	15,000.00	500.00	0.00	15,750.00
2009	5,500.00	10,200.00	0.00	3,500.00	19,200.00
2010	4,800.00	20,000.00	0.00	2,500.00	27,300.00
2011	4,650.00	3,900.00	0.00	4,200.00	12,750.00
2012	14,334.56	1,122.00	30,200.00	1,000.00	46,656.56
2013	23,054.00	23,707.67	51,030.00	1,760.00	99,551.67
2014	7,485.00	1,000.00	9,384.00	19,132.00	37,001.00
2015	21,300.00	900.00	61,500.00	17,600.00	101,300.00
2016	9,000.00	100.00	9,800.00	75,200.00	94,100.00
2017	81,950.00	700.00	0.00	127,500.00	210,150.00
2018	6,550.00	0.00	0.00	13,800.00	20,350.00
	215,123.56	89,629.67	165,414.00	272,702.00	742,869.23

Report Menu Name

Donations - Recency / Frequency Report, 0-3 Month Donors

Description

This report should only be run directly (outside of a selection result) as it runs a special selection required for the special features of the report automatically. This report will break monetary donations of the past 90 days down into amount range categories in increments of $10 all the way up to the top $100+ category. For each range category, the number of donations given as single gifts by the respective donor are counted in the column, "Single Gifts." For a gift to be counted in this column, the donor giving the gift must have only given one gift in the 90-day period. If a a donation is one of multiple gifts in the period by the same donor, it will be counted in the, "Multiple Gifts" column. Likewise, donations will be summed in the corresponding "Income" column. The, "Total Count" and "Total Income" columns represent the combined count and income columns. This report is intended to give you a sense of the gift amount ranges providing your organization with the most revenue, so that you may focus on soliciting donations of those amounts. If reports such as this are of particular interest to your organization, you should be sure and try the DonorQuest, "Donor Metrics" series of reports found under the Reports menu.

Here is what the report looks like when run on a larger sample database:

03/02/2018 Donations - Recency / Frequency Report, 0-3 Month Donors Page 1

Monetary donations made in past 90 Days (0-3 months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	2	$10.00	24	$100.28	26	$110.28
10 .. 19.99	21	$244.75	12	$151.00	33	$395.75
20 .. 29.99	88	$2,100.00	5	$115.00	93	$2,215.00
30 .. 39.99	6	$190.00	0	$0.00	6	$190.00
40 .. 49.99	4	$160.00	10	$418.00	14	$578.00
50 .. 59.99	57	$2,855.00	5	$250.00	62	$3,105.00
60 .. 69.99	1	$60.00	0	$0.00	1	$60.00
70 .. 79.99	3	$225.00	0	$0.00	3	$225.00
100+	172	$699,294.06	23	$12,100.00	195	$711,394.06
	354	$705,138.81	79	$13,134.28	433	$718,273.09

Report Menu Name

Donations - Recency / Frequency Report, 4-6 Month Donors

Description

This is a variation on the Recency / Frequency report which looks at donations made in the past 91 to 180 days from the day you run the report.

03/02/2018 Donations - Recency / Frequency Report, 4-6 Months Donors Page 1

Monetary donations made in past 91 to 180 Days (4-6 months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	10	$50.81	41	$172.42	51	$223.23
10 .. 19.99	55	$626.02	15	$170.00	70	$796.02
20 .. 29.99	241	$5,710.00	14	$330.00	255	$6,040.00
30 .. 39.99	29	$926.31	1	$30.00	30	$956.31
40 .. 49.99	6	$250.00	12	$507.00	18	$757.00
50 .. 59.99	117	$5,855.00	8	$400.00	125	$6,255.00
60 .. 69.99	3	$185.00	0	$0.00	3	$185.00
70 .. 79.99	3	$220.00	0	$0.00	3	$220.00
80 .. 89.99	1	$80.00	0	$0.00	1	$80.00
100+	280	$161,071.41	33	$165,525.00	313	$326,596.41
	745	$174,974.55	124	$167,134.42	869	$342,108.97

Report Menu Name

Donations - Recency / Frequency Report, 7-12 Month Donors

Description

This is a variation on the Recency / Frequency report which looks at donations made in the past 181 to 365 days from the day you run the report.

03/02/2018 Donations - Recency / Frequency Report, 7-12 Month Donors Page 1

Monetary donations made in past 181 to 365 Days (7-12 months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	1	$5.00	80	$347.67	81	$352.67
10 .. 19.99	24	$280.67	37	$445.36	61	$726.03
20 .. 29.99	92	$2,193.27	16	$380.00	108	$2,573.27
30 .. 39.99	14	$427.00	6	$200.13	20	$627.13
40 .. 49.99	4	$165.00	26	$1,098.50	30	$1,263.50
50 .. 59.99	62	$3,105.00	9	$450.00	71	$3,555.00
70 .. 79.99	5	$375.00	0	$0.00	5	$375.00
100+	273	$569,981.18	100	$130,911.87	373	$700,893.05
	475	$576,532.12	274	$133,833.53	749	$710,365.65

Report Menu Name

Donations - Recency / Frequency Report, 13-18 Month Donors

Description

This is a variation on the Recency / Frequency report which looks at donations made in the past 366 to 546 days from the day you run the report.

03/02/2018 Donations - Recency / Frequency Report, 13-18 Month Donors Page 1

Monetary donations made in past 366 to 546 Days (13-18 months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	9	$45.00	83	$313.87	92	$358.87
10 .. 19.99	62	$674.95	53	$613.04	115	$1,287.99
20 .. 29.99	291	$6,890.00	26	$635.00	317	$7,525.00
30 .. 39.99	42	$1,354.00	8	$275.31	50	$1,629.31
40 .. 49.99	8	$320.00	25	$1,054.00	33	$1,374.00
50 .. 59.99	123	$6,160.00	13	$650.00	136	$6,810.00
60 .. 69.99	2	$125.00	0	$0.00	2	$125.00
70 .. 79.99	7	$525.00	3	$225.00	10	$750.00
80 .. 89.99	3	$250.00	0	$0.00	3	$250.00
90 .. 99.99	2	$180.00	0	$0.00	2	$180.00
100+	339	$368,072.24	87	$804,831.12	426	$1,172,903.36
	888	$384,596.19	298	$808,597.34	1,186	$1,193,193.53

Report Menu Name

Donations - Recency / Frequency Report, 19-24 Month Donors

Description

This is a variation on the Recency / Frequency report which looks at donations made in the past 547 to 727 days from the day you run the report.

03/02/2018 — Donations - Recency / Frequency Report, 19-24 Month Donors — Page 1

Monetary donations made in past 547 to 727 Days (19-24 months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	4	$10.00	56	$206.99	60	$216.99
10 .. 19.99	41	$467.00	30	$357.18	71	$824.18
20 .. 29.99	129	$3,000.03	19	$465.00	148	$3,465.03
30 .. 39.99	17	$553.80	7	$210.00	24	$763.80
40 .. 49.99	6	$247.00	17	$720.50	23	$967.50
50 .. 59.99	66	$3,305.00	14	$700.00	80	$4,005.00
60 .. 69.99	0	$0.00	6	$375.00	6	$375.00
70 .. 79.99	2	$150.00	5	$370.00	7	$520.00
80 .. 89.99	1	$85.00	0	$0.00	1	$85.00
100+	290	$288,711.37	89	$310,333.98	379	$599,045.35
	556	$296,529.20	243	$313,738.65	799	$610,267.85

Report Menu Name

Donations - Recency / Frequency Report, 25-36 Month Donors

Description

This is a variation on the Recency / Frequency report which looks at donations made in the past 728 to 907 days from the day you run the report.

03/02/2018 Donations - Recency / Frequency Report, 25-36 Month Donors Page 1

Monetary donations made in past 728 to 907 Days (25-36 months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	8	$40.00	48	$184.27	56	$224.27
10 .. 19.99	61	$675.00	26	$287.50	87	$962.50
20 .. 29.99	330	$7,825.00	25	$608.00	355	$8,433.00
30 .. 39.99	22	$686.00	1	$30.00	23	$716.00
40 .. 49.99	7	$283.50	3	$128.24	10	$411.74
50 .. 59.99	152	$7,600.00	28	$1,400.00	180	$9,000.00
60 .. 69.99	1	$60.00	11	$687.50	12	$747.50
70 .. 79.99	9	$671.52	1	$70.00	10	$741.52
80 .. 89.99	2	$160.00	0	$0.00	2	$160.00
100+	337	$405,980.20	53	$100,675.00	390	$506,655.20
	929	$423,981.22	196	$104,070.51	1,125	$528,051.73

Report Menu Name

Donations - Recency / Frequency Report, 36-plus Month Donors

Description

This is a variation on the Recency / Frequency report which looks at donations made in the past 908-plus days from the day you run the report.

03/02/2018 — Donations - Recency / Frequency Report, 36-plus Months Donors — Page 1

Monetary Donations made in past 908-plus Days (36-plus months)

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	91	$432.38	1,746	$6,535.10	1,837	$6,967.48
10 .. 19.99	227	$2,451.00	1,511	$17,748.26	1,738	$20,199.26
20 .. 29.99	679	$15,856.00	3,250	$76,652.50	3,929	$92,508.50
30 .. 39.99	69	$2,166.00	364	$11,455.07	433	$13,621.07
40 .. 49.99	25	$1,005.00	152	$6,629.97	177	$7,634.97
50 .. 59.99	312	$15,618.25	1,397	$69,936.32	1,709	$85,554.57
60 .. 69.99	12	$734.00	106	$6,592.00	118	$7,326.00
70 .. 79.99	31	$2,297.00	71	$5,281.00	102	$7,578.00
80 .. 89.99	7	$569.00	11	$908.00	18	$1,477.00
90 .. 99.99	2	$180.00	9	$819.75	11	$999.75
100+	630	$336,211.44	5,168	$8,596,046.70	5,798	$8,932,258.14
	2,085	$377,520.07	13,785	$8,798,604.67	15,870	$9,176,124.74

Report Menu Name

Donations - Recency / Frequency Report, Overall Totals

Description

This is a variation on the Recency / Frequency report which looks at overall totals for all donations for all time.

03/02/2018 Donations - Recency / Frequency Report, Overall Totals Page 1

Monetary (Non-Alternate-Unit) Donations

Donation Amount	Single Gifts	Income	Multiple Gifts	Income	Total Count	Total Income
0 .. 9.99	87	$407.38	2,121	$8,064.91	2,208	$8,472.29
10 .. 19.99	218	$2,366.39	1,959	$22,847.84	2,177	$25,214.23
20 .. 29.99	701	$16,418.30	4,508	$106,438.50	5,209	$122,856.80
30 .. 39.99	77	$2,441.80	512	$16,157.82	589	$18,599.62
40 .. 49.99	34	$1,376.00	271	$11,610.71	305	$12,986.71
50 .. 59.99	350	$17,523.25	2,013	$100,761.32	2,363	$118,284.57
60 .. 69.99	11	$669.00	132	$8,212.00	143	$8,881.00
70 .. 79.99	31	$2,297.00	109	$8,112.52	140	$10,409.52
80 .. 89.99	9	$729.00	16	$1,323.00	25	$2,052.00
90 .. 99.99	3	$270.00	10	$909.75	13	$1,179.75
100+	742	$871,653.19	7,133	$12,078,192.38	7,875	$12,949,845.57
	2,263	$916,151.31	18,784	$12,362,630.75	21,047	$13,278,782.06

Report Menu Name

Donations - Soft Credit Donations Only, Grouped By Giver

Description

Designed to be used with a Donation-based Selection Result, this report layout will further filter the selection so that only donations which have been soft-credited are shown. For each donation, this report will show the name of the actual giver, and the name of the soft credit recipient. Donations are grouped and totaled by the actual givers.

02/15/2018 | **Donations - Soft Credit Donations Only, Grouped By Giver** | Page 1

Universal Qualification

ID	Actual Giver	Date	Amount	Type	Stimulus	Fund	Appeal	Comment	Soft Credit To
18	Bowie, Denise	01/05/2015	5,000.00	CA	UNSOL	5000			Bach Memorial Account
			5,000.00						
24	IBM Corporation	04/04/2013	12,345.67	CK	13AC	1000			Baker, Thomas
			12,345.67						
32	Intrepid Systems Inc.	01/25/2011	1,500.00	CK	11AC	1000	APPEAL1		Baker, Thomas
		12/23/2006	500.00	CK	06AC	1000		Soft Credit to Baker	Baker, Thomas
		03/04/2017	1,000.00	CA	17AC	1000	APPEAL1	General Comment goes here	Musk, Elon
			3,000.00						
23	Lodge, John	11/24/2014	7,500.00	VC	UNSOL	5000		Given in Honor of Mozart on his birthday	Mozart Memorial Account
		01/23/2015	5,000.00	CA	UNSOL	5000		Soft Credit to Bach Memorial	Bach Memorial Account
			12,500.00						
3	Trek Foundation	01/31/2014	350.00	CK	14AC	3000		Example of soft credit donation	Baker, Thomas
			350.00						
10	Waters, Roger	11/24/2014	10,000.00	CA	UNSOL	5000		Given in Honor of Mozart on his birthday.	Mozart Memorial Account
			10,000.00						
			43,195.67						

Report Menu Name

Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient

Description

Designed to be used with a Donation-based Selection Result, this report layout will further filter the selection so that only donations which have been soft-credited are shown. For each donation, this report will show the name of the soft credit recipient and the actual giver. Donations are grouped and totaled by the soft credit recipient. The donations are further subsorted by donation date, so they will appear in chronological order for each soft credit recipient.

02/16/2018 Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient Page 1

Universal Qualification

ID	Soft Credit To	Date	Amount	Type	Stimulus	Fund	Appeal	Comment	Actual Giver
28	Bach Memorial Account	01/05/2015	5,000.00	CA	UNSOL	5000			Bowie, Denise
28	Bach Memorial Account	01/23/2015	5,000.00	CA	UNSOL	5000		Soft Credit to Bach Memorial	Lodge, John
			10,000.00						
15	Baker, Thomas	12/23/2006	500.00	CK	06AC	1000		Soft Credit to Baker	Intrepid Systems Inc.
15	Baker, Thomas	01/25/2011	1,500.00	CK	11AC	1000	APPEAL1		Intrepid Systems Inc.
15	Baker, Thomas	04/04/2013	12,345.67	CK	13AC	1000			IBM Corporation
15	Baker, Thomas	01/31/2014	350.00	CK	14AC	3000		Example of soft credit donation	Trek Foundation
			14,695.67						
5	Mozart Memorial Account	11/24/2014	7,500.00	VC	UNSOL	5000		Given in Honor of Mozart on his birthday	Lodge, John
5	Mozart Memorial Account	11/24/2014	10,000.00	CA	UNSOL	5000		Given in Honor of Mozart on his birthday.	Waters, Roger
			17,500.00						
53	Musk, Elon	03/04/2017	1,000.00	CA	17AC	1000	APPEAL1	General Comment goes here	Intrepid Systems Inc.
			1,000.00						
			43,195.67						

Report Menu Name

Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Subsorted By Giver

Description

Designed to be used with a Donation-based Selection Result, this report layout will further filter the selection so that only donations which have been soft-credited are shown. For each donation, this report will show the name of the soft credit recipient and the actual giver. Donations are grouped and totaled by the soft credit recipient. The donations are further subsorted by the actual giver, so they will appear in alphabetical order by the giver's name for each soft credit recipient.

02/16/2018 **Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Subsorted By Giver** Page 1

Universal Qualification

ID	Soft Credit To	Date	Amount	Type	Stimulus	Fund	Appeal	Comment	Actual Giver
28	Bach Memorial Account	01/05/2015	5,000.00	CA	UNSOL	5000			Bowie, Denise
28	Bach Memorial Account	01/23/2015	5,000.00	CA	UNSOL	5000		Soft Credit to Bach Memorial	Lodge, John
			10,000.00						
15	Baker, Thomas	01/25/2011	1,500.00	CK	11AC	1000	APPEAL1		Intrepid Systems Inc.
15	Baker, Thomas	12/23/2006	500.00	CK	06AC	1000		Soft Credit to Baker	Intrepid Systems Inc.
15	Baker, Thomas	04/04/2013	12,345.67	CK	13AC	1000			IBM Corporation
15	Baker, Thomas	01/31/2014	350.00	CK	14AC	3000		Example of soft credit donation	Trek Foundation
			14,695.67						
5	Mozart Memorial Account	11/24/2014	7,500.00	VC	UNSOL	5000		Given in Honor of Mozart on his birthday	Lodge, John
5	Mozart Memorial Account	11/24/2014	10,000.00	CA	UNSOL	5000		Given in Honor of Mozart on his birthday.	Waters, Roger
			17,500.00						
53	Musk, Elon	03/04/2017	1,000.00	CA	17AC	1000	APPEAL1	General Comment goes here	Intrepid Systems Inc.
			1,000.00						
			43,195.67						

Report Menu Name

Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Totals Only

Description

Designed to be used with a Donation-based Selection Result, this report layout will further filter the selection so that only donations which have been soft-credited are considered. Soft credit donations are totaled and counted for each soft credit recipient. Also shown are the name and address for each sort credit recipient.

02/16/2018 **Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Totals Only** Page 1

Universal Qualification

Recipient Name	Recipient ID	Address	City	State	Zip	Total Amount	Total Count
Bach Memorial Account	28	3543 Brandenburg Way	Seattle	WA	98109	10,000.00	2
Baker, Thomas	15	4968 Tardis Ave.	San Jose	CA	95112-3211	14,695.67	4
Mozart Memorial Account	5	62734 Vienna Ave	Salzburg	CA	92104	17,500.00	2
Musk, Elon	53	3141 Tesla Ave.	Fremont	CA	94538	1,000.00	1
						43,195.67	9

Report Menu Name

Donations - Total Of Gifts In Dollar Ranges By Calendar Year

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show donation totals by calendar year in five amount ranges.

03/03/2018 Donations - Total Of Gifts In Dollar Ranges By Calendar Year Page 1

Universal Qualification

Year	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
1997	50	100	0	0	0
1998	0	200	0	0	0
1999	50	100	400	0	0
2000	0	0	0	600	0
2001	0	200	400	750	0
2002	10	0	0	600	4,000
2003	0	0	0	750	12,000
2004	0	0	0	0	5,500
2005	0	0	0	0	6,500
2006	50	0	0	500	10,000
2007	0	100	0	1,400	15,000
2008	50	200	0	0	18,500
2009	0	100	400	500	17,200
2010	0	400	0	600	28,000
2011	0	200	1,100	2,450	36,000
2012	100	1,327	700	3,435	62,685
2013	148	1,447	3,016	13,142	57,525
2014	0	100	1,100	1,885	84,500
2015	0	1,000	0	1,200	105,000
2016	0	100	0	1,000	136,000
2017	0	200	450	3,150	113,150
2018	50	0	0	1,000	6,000
	508	5,774	7,566	32,962	717,559

Report Menu Name

Donations - Total Of Gifts In Dollar Ranges By Calendar Year And Week

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show donation totals by calendar year and week in five amount ranges.

02/16/2018 **Donations - Total Of Gifts In Dollar Ranges By Calendar Year And Week** Page 5

Universal Qualification

Year	Week	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
2015	36	0	0	0	0	2,000
2015	37	0	100	0	0	0
2015	39	0	0	0	0	7,500
2015	40	0	0	0	0	70,000
2015	41	0	100	0	0	0
2015	45	0	100	0	0	0
2015	50	0	0	0	0	5,000
2016	4	0	0	0	0	2,500
2016	9	0	0	0	500	0
2016	14	0	0	0	0	6,000
2016	20	0	100	0	0	0
2016	36	0	0	0	500	0
2016	44	0	0	0	0	8,000
2016	45	0	0	0	0	94,000
2016	47	0	0	0	0	5,000
2016	48	0	0	0	0	14,000
2016	50	0	0	0	0	6,500
2017	1	0	0	0	600	0
2017	5	0	0	450	0	0
2017	9	0	0	0	0	1,000
2017	10	0	0	0	0	7,000
2017	13	0	0	0	750	72,150
2017	15	0	0	0	500	0
2017	17	0	200	0	0	0
2017	40	0	0	0	500	0
2017	42	0	0	0	0	1,000
2017	46	0	0	0	0	1,000
2017	50	0	0	0	0	11,000
2017	53	0	0	0	800	0
2018	2	50	0	0	0	5,000
2018	3	0	0	0	500	1,000
		508	5,774	7,566	32,462	697,559

Report Menu Name

Donations - Total Of Gifts In Dollar Ranges By Fiscal Year

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show donation totals by fiscal year in five amount ranges.

02/16/2018 Donations - Total Of Gifts In Dollar Ranges By Fiscal Year Page 1

Universal Qualification

Year	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
1997	50	100	0	0	0
1998	0	200	0	0	0
1999	50	100	400	0	0
2000	0	0	0	600	0
2001	0	200	400	750	0
2002	0	0	0	600	1,000
2003	10	0	0	750	9,000
2004	0	0	0	0	11,500
2005	0	0	0	0	6,500
2006	50	0	0	0	10,000
2007	0	100	0	1,400	15,000
2008	50	200	0	500	15,000
2009	0	100	400	500	18,200
2010	0	200	0	600	26,500
2011	0	200	1,100	2,450	9,000
2012	0	422	400	2,600	43,235
2013	188	1,752	1,450	7,687	88,475
2014	60	800	2,966	8,175	25,000
2015	0	600	0	1,200	99,500
2016	0	600	0	500	93,000
2017	0	200	450	2,350	207,650
2018	50	0	0	1,800	19,000
	508	5,774	7,566	32,462	697,559

Report Menu Name

Donations - Total Of Gifts In Dollar Ranges By Fiscal Year And Week

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will show donation totals by calendar year and week in five amount ranges.

03/03/2018 **Donations - Total Of Gifts In Dollar Ranges By Fiscal Year And Week** Page 5

Universal Qualification

Year	Week	$1 - $99	$100 - $249	$250 - $499	$500 - $999	$1000+
2016	14	0	0	0	0	6,000
2016	20	0	100	0	0	0
2016	28	0	100	0	0	0
2016	32	0	100	0	0	0
2016	36	0	0	0	0	2,000
2016	37	0	100	0	0	0
2016	39	0	0	0	0	7,500
2016	40	0	0	0	0	70,000
2016	41	0	100	0	0	0
2016	45	0	100	0	0	0
2016	50	0	0	0	0	5,000
2017	1	0	0	0	600	0
2017	5	0	0	450	0	0
2017	9	0	0	0	0	21,000
2017	10	0	0	0	0	7,000
2017	13	0	0	0	750	72,150
2017	15	0	0	0	500	0
2017	17	0	200	0	0	0
2017	36	0	0	0	500	0
2017	44	0	0	0	0	8,000
2017	45	0	0	0	0	94,000
2017	47	0	0	0	0	5,000
2017	48	0	0	0	0	14,000
2017	50	0	0	0	0	6,500
2018	2	50	0	0	0	5,000
2018	3	0	0	0	1,000	1,000
2018	40	0	0	0	500	0
2018	42	0	0	0	0	1,000
2018	46	0	0	0	0	1,000
2018	50	0	0	0	0	11,000
2018	53	0	0	0	800	0
		508	5,774	7,566	32,962	717,559

Report Menu Name

Donations - Totals And Year Counts

Description

Designed to be run directly or used with a Donation-based Selection Result, this report layout will count the number of years for which each each donor shown had giving. The years don't have to be consecutive. The count simply represents the number of discrete years in which the donor gave. If you use this report with a selection of donations for the past ten years, only those years will be considered in the count. The Amount is simply a total of all giving for the donor for all donations processed by the report. The donations processed can either be all monetary donations (the default if the report is run directly outside of a selection result), or the donations of a specific selection result.

02/16/2018 **Donations - Totals And Year Counts** **Page 1**

All Donations

ID Num	Giving Entity	Amount	TY Value	Year Count
6	1984 Productions	2,000.00	0.00	3
28	Bach Memorial Account	1,250.00	0.00	2
15	Baker, Thomas	21,550.00	0.00	11
18	Bowie, Denise	20,950.00	0.00	3
20	Burke, James	24,014.00	0.00	5
11	Decca Records	850.00	0.00	3
17	Foster, James	1,625.00	0.00	4
4	Gore, Martin L.	2,160.00	0.00	3
12	Hayward, Justin	94,010.00	0.00	20
24	IBM Corporation	14,814.23	0.00	2
32	Intrepid Systems Inc.	33,100.00	0.00	19
21	Knight, Paula	11,800.00	0.00	10
13	Lennon, John	17,000.00	0.00	2
23	Lodge, John	13,500.00	0.00	3
5	Mozart Memorial Account	500.00	0.00	1
53	Musk, Elon	48,000.00	0.00	4
29	Northern Songs Limited, (U.S. Division)	343,500.00	0.00	9
2	Progressive Music, Inc.	2,896.00	0.00	3
7	Schmidt Aeronautic Foundation	6,700.00	0.00	4
8	Scott, Montgomery	1,000.00	0.00	1
26	Smith, John	200.00	0.00	1
27	The Corporation For Public Broadcasting	50,000.00	0.00	1
3	Trek Foundation	11,200.00	0.00	4
10	Waters, Roger	20,250.00	0.00	4
		742,869.23	0.00	122

Report Menu Name

Donations - Totals And Year Counts, With Address, First, And Most Recent Years

Description

This is a variation on the, "Donations - Totals And Year Counts" report (shown above) which also includes the full mailing and email address for each donor, as well as the date of their first and most recent donation.

02/16/2018 **Donations - Totals And Year Counts, With Address, First, And Most Recent Years** **Page 1**

All Donations

ID Num	Giving Entity	Amount	Year Count	First Gift	Last Gift
6	Patrick McGoohan 1984 Productions 1984 In The Village Oceania, CA 95070-3212 Patrick@donorquest.com	2,000.00	3	04/20/2011	02/08/2014
28	Johann Bach Bach Memorial Account 3543 Brandenburg Way Seattle, WA 98109 Johann@donorquest.com	1,250.00	2	01/04/2013	04/15/2017
15	Thomas Baker 4968 Tardis Ave. San Jose, CA 95112-3211 Thomas@donorquest.com	21,550.00	11	01/25/2007	03/31/2017
18	Denise Bowie 123 First Avenue Apt 200 San Jose, CA 95119-2312 Denise@donorquest.com	20,950.00	3	03/23/2013	03/31/2017
20	James Burke 826 Connections Way Palo Alto, CA 94304-7899 James@donorquest.com	24,014.00	5	02/13/2012	12/31/2017
11	Peter Davidson Decca Records 3775 Galafrey Way Palo Alto, CA 94300-2112 Peter@donorquest.com	850.00	3	09/06/2012	01/07/2018
17	James Foster 14552 Medical Dr. Saratoga, CA 95070-3212 James@donorquest.com	1,625.00	4	04/20/2011	01/30/2017
4	Martin L. Gore Stanford OPA Bldg. Eugene, OR 97401 Martin L.@donorquest.com	2,160.00	3	10/11/2012	01/06/2014
12	Justin Hayward Threshold Records 1701 Enterprise Way Seattle, WA 98109 Justin@donorquest.com	94,010.00	20	01/25/1997	03/26/2017

Report Menu Name

Donations - Totals, Counts, Averages By City And Year

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation totals, counts, and average amount by city, and subtotals within each city by calendar year.

02/16/2018 Donations - Totals, Counts, Averages By City And Year Page 1

All Donations

	Year	Amount	Count	Average
- Eugene				
	2012	175.00	1	175.00
	2013	1,425.00	4	356.25
	2014	560.00	1	560.00
		2,160.00	6	360.00
- Fremont				
	2015	9,500.00	2	4,750.00
	2016	12,500.00	2	6,250.00
	2017	20,000.00	5	4,000.00
	2018	6,000.00	2	3,000.00
		48,000.00	11	4,363.64
- Mount Shasta				
	2011	400.00	1	400.00
	2012	7,450.00	1	7,450.00
	2013	3,000.00	2	1,500.00

Report Menu Name

Donations - Volunteer Hours For Soft Credit Recipient, Totals Only

Description

Designed to be used with a Donation-based Selection of volunteer hours (donations coded with a type of "HR"), this report layout will show total hours credited to each soft credit recipient of hours. This could be the employer or agency which encourages their employees to volunteer their time. The actual volunteers would still have the hard credits of the hours they donated in their donor accounts.

02/16/2018 Donations - Volunteer Hours For Soft Credit Recipient, Totals Only Page 1

Ordered By Soft Credit Recipient and Donation Date

Soft Link	Name	Address	City	State	Zip	Amount	Count
7	Schmidt Aeronautic Foundat	368 Moore Ave.	Saratoga	CA	95070-1234	8.00	1
						8.00	1

Report Menu Name

Donations - Yearly Donation Counts By $50 Increments

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation counts for the current and past four calendar years for donations of amounts in specific amount ranges.

03/03/2018 **Donations - Yearly Donation Counts By $50 Increments** Page 1

Donations Since January of 2008

Donation Amount	2018	2017	2016	2015	2014	Totals
0 .. 49.99	116	920	853	885	980	3,754
50 .. 99.99	44	256	251	268	280	1,099
100 .. 149.99	39	390	313	352	334	1,428
150 .. 199.99	5	36	39	44	26	150
200 .. 249.99	9	74	57	34	30	204
250 .. 299.99	4	59	49	40	36	188
300 .. 349.99	2	26	17	16	17	78
350 .. 399.99	1	2	6	6	12	27
400 .. 449.99	0	5	6	2	6	19
450 .. 499.99	0	0	1	0	0	1
500 .. 549.99	7	72	59	60	74	272
550 .. 599.99	0	1	4	2	0	7
600 .. 649.99	0	4	3	4	4	15
650 .. 699.99	0	4	0	1	1	6
700 .. 749.99	0	1	0	2	2	5
750 .. 799.99	0	2	2	1	3	8
800 .. 849.99	0	2	3	3	3	11
850 .. 899.99	0	1	0	0	0	1
900 .. 949.99	0	0	1	0	0	1
950 .. 999.99	0	0	1	0	2	3
1000 .. 1049.99	17	87	88	82	74	348
1050 .. 1099.99	1	0	1	1	0	3
1100 .. 1149.99	0	3	1	1	1	6
1150 .. 1199.99	0	0	0	0	0	0
1200 .. 1249.99	0	1	3	1	0	5
1250 .. 1299.99	1	5	2	1	3	12
1300 .. 1349.99	0	0	0	0	0	0
1350 .. 1399.99	0	0	0	1	1	2
1400 .. 1449.99	0	0	0	0	1	1
1450 .. 1499.99	0	0	0	0	0	0
1500 .. 1549.99	1	9	10	8	5	33
1550 .. 1599.99	0	0	1	0	0	1
1700 .. 1749.99	0	0	0	0	1	1
1750 .. 1799.99	0	0	1	0	0	1
1800 .. 1849.99	0	0	0	0	0	0
1850 .. 1899.99	1	1	0	0	0	2
1950 .. 1999.99	0	0	0	0	0	0
2000 .. 2049.99	1	14	15	10	8	48
2100 .. 2149.99	0	0	1	0	0	1
2150 .. 2199.99	0	0	0	0	0	0
2200 .. 2249.99	0	0	1	1	0	2
2250 .. 2299.99	0	0	0	1	0	1
2300 .. 2349.99	0	1	0	0	1	2
2350 .. 2399.99	0	2	0	0	0	2
2400 .. 2449.99	0	1	1	0	0	2

Report Menu Name

Donations - Yearly Donation Counts By $50 Increments (Fiscal Years)

Description

Designed to be used with a Donation-based Selection Result, this report layout will show donation counts for the current and past four fiscal years for donations of amounts in specific amount ranges.

03/03/2018 **Donations - Yearly Donation Counts By $50 Increments (Fiscal Years)** **Page 1**

Donations Since January of 2008

Donation Amount	2017	2016	2015	2014	2013	Totals
0 .. 49.99	648	920	857	927	1,062	4,414
50 .. 99.99	205	232	293	266	283	1,279
100 .. 149.99	252	334	352	339	350	1,627
150 .. 199.99	23	38	44	29	46	180
200 .. 249.99	52	58	52	30	42	234
250 .. 299.99	42	48	42	40	36	208
300 .. 349.99	15	25	11	15	17	83
350 .. 399.99	2	1	7	8	16	34
400 .. 449.99	2	6	3	5	7	23
450 .. 499.99	0	0	1	0	0	1
500 .. 549.99	43	58	54	64	82	301
550 .. 599.99	1	1	3	2	0	7
600 .. 649.99	1	4	4	4	7	20
650 .. 699.99	3	1	1	0	1	6
700 .. 749.99	0	1	1	1	2	5
750 .. 799.99	0	3	2	1	4	10
800 .. 849.99	1	3	2	3	3	12
850 .. 899.99	0	1	0	0	0	1
900 .. 949.99	0	0	1	0	1	2
950 .. 999.99	0	0	1	1	1	3
1000 .. 1049.99	55	82	91	79	72	379
1050 .. 1099.99	1	0	2	0	1	4
1100 .. 1149.99	2	1	2	0	1	6
1150 .. 1199.99	0	0	0	0	0	0
1200 .. 1249.99	0	3	2	0	2	7
1250 .. 1299.99	3	3	3	2	2	13
1300 .. 1349.99	0	0	0	0	0	0
1350 .. 1399.99	0	0	1	1	0	2
1400 .. 1449.99	0	0	0	1	1	2
1450 .. 1499.99	0	0	0	0	0	0
1500 .. 1549.99	5	12	9	3	7	36
1550 .. 1599.99	0	0	1	0	0	1
1700 .. 1749.99	0	0	0	0	1	1
1750 .. 1799.99	0	1	0	0	0	1
1800 .. 1849.99	0	0	0	0	0	0
1850 .. 1899.99	2	0	0	0	0	2
1950 .. 1999.99	0	0	0	0	0	0
2000 .. 2049.99	11	13	11	8	11	54
2100 .. 2149.99	0	0	1	0	0	1
2150 .. 2199.99	0	0	0	0	0	0
2200 .. 2249.99	0	0	1	1	2	4
2250 .. 2299.99	0	0	0	1	0	1
2300 .. 2349.99	0	1	0	1	0	2
2350 .. 2399.99	1	1	0	0	0	2
2400 .. 2449.99	1	1	0	0	1	3

Report Menu Name

Donations - Yearly Donation Totals By $50 Increments

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals for the current and past four calendar years for donations of amounts in specific amount ranges.

02/16/2018 Donations - Yearly Donation Totals By $50 Increments Page 1

All Donations

Donation Amount	2018	2017	2016	2015	2014	Totals
0 .. 49.99	0	0	0	0	0	0
50 .. 99.99	50	0	0	0	0	50
100 .. 149.99	0	200	100	1,000	100	1,400
150 .. 199.99	0	0	0	0	0	0
200 .. 249.99	0	0	0	0	0	0
250 .. 299.99	0	0	0	0	0	0
300 .. 349.99	0	0	0	0	0	0
350 .. 399.99	0	0	0	0	700	700
400 .. 449.99	0	0	0	0	400	400
450 .. 499.99	0	450	0	0	0	450
500 .. 549.99	500	500	500	500	0	2,000
550 .. 599.99	0	0	0	0	560	560
600 .. 649.99	0	600	0	0	600	1,200
700 .. 749.99	0	0	0	700	725	1,425
750 .. 799.99	0	750	0	0	0	750
800 .. 849.99	0	800	0	0	0	800
850 .. 899.99	0	0	0	0	0	0
900 .. 949.99	0	0	0	0	0	0
1000 .. 1049.99	1,000	4,000	0	1,000	3,000	9,000
1200 .. 1249.99	0	0	0	0	0	0
1400 .. 1449.99	0	0	0	0	0	0
1500 .. 1549.99	0	0	0	0	0	0
2000 .. 2049.99	0	0	0	2,000	0	2,000
2500 .. 2549.99	0	0	2,500	0	2,500	5,000
3000 .. 3049.99	0	0	0	0	0	0
4000 .. 4049.99	0	4,000	0	0	0	4,000
4500 .. 4549.99	0	0	0	4,500	0	4,500
5000+	5,000	85,150	133,500	97,500	79,000	400,150
	6,550	96,450	136,600	107,200	87,585	434,385

Report Menu Name

Donations - Yearly Donation Totals By $50 Increments (Fiscal Years)

Description

Designed to be used with a Donation-based Selection Result, this report layout will show totals for the current and past four fiscal years for donations of amounts in specific amount ranges.

02/16/2018 Donations - Yearly Donation Totals By $50 Increments (Fiscal Years) Page 1

All Donations

Donation Amount	2018	2017	2016	2015	2014	Totals
0 .. 49.99	0	0	0	0	0	0
50 .. 99.99	50	0	0	0	60	110
100 .. 149.99	0	200	600	600	200	1,600
150 .. 199.99	0	0	0	0	0	0
200 .. 249.99	0	0	0	0	600	600
250 .. 299.99	0	0	0	0	250	250
300 .. 349.99	0	0	0	0	300	300
350 .. 399.99	0	0	0	0	700	700
400 .. 449.99	0	0	0	0	1,266	1,266
450 .. 499.99	0	450	0	0	450	900
500 .. 549.99	500	500	500	500	0	2,000
550 .. 599.99	0	0	0	0	560	560
600 .. 649.99	0	600	0	0	1,200	1,800
700 .. 749.99	0	0	0	700	725	1,425
750 .. 799.99	0	750	0	0	0	750
800 .. 849.99	800	0	0	0	4,800	5,600
850 .. 899.99	0	0	0	0	890	890
900 .. 949.99	0	0	0	0	0	0
1000 .. 1049.99	4,000	1,000	0	1,000	3,000	9,000
1200 .. 1249.99	0	0	0	0	0	0
1400 .. 1449.99	0	0	0	0	0	0
1500 .. 1549.99	0	0	0	0	1,500	1,500
2000 .. 2049.99	0	0	2,000	0	0	2,000
2500 .. 2549.99	0	0	2,500	0	2,500	5,000
3000 .. 3049.99	0	0	0	0	0	0
4000 .. 4049.99	0	4,000	0	0	0	4,000
4500 .. 4549.99	0	0	0	4,500	0	4,500
5000+	15,000	202,650	88,500	94,000	18,000	418,150
	20,350	210,150	94,100	101,300	37,001	462,901

8.3 Sample Pledge Reports

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year

Description

Designed to be used with a Pledge-based Selection Result, this report layout will group pledges by their payment frequency, then show the expected amount of revenue from pledge payments by month within the current fiscal year. Note that all of the pledge forecasting reports for fiscal years are currently designed to work on a standard fiscal year which begins in July and ends in June of the following calendar year. If you have a fiscal year with a different starting month, then your organization will require a custom version of these series of reports (contact your DonorQuest support representative about this).

02/16/2018 **Cash Flow Forecast From Pledges (Fiscal 2018)** **Page 1**

All Pledges

Giving Entity	Start	Stop	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Year Total
Payment Frequency: Monthly															
Musk, Elon	02/01/2018	02/01/2019	500	500	500	500	500	500	500	500					4,000
Musk, Elon	10/01/2017	10/01/2018	1,000	1,000	1,000	1,000									4,000
			1,500	1,500	1,500	1,500	500	500	500	500	0	0	0	0	8,000
Payment Frequency: Quarterly															
Musk, Elon	02/01/2018	02/01/2019		6,000			6,000			6,000					18,000
			0	6,000	0	0	6,000	0	0	6,000	0	0	0	0	18,000
Payment Frequency: Semester															
Musk, Elon	02/01/2018	02/01/2020		1,500						1,500					3,000
			0	1,500	0	0	0	0	0	1,500	0	0	0	0	3,000
Payment Frequency: Yearly															
Musk, Elon	02/01/2018	02/01/2020								25,000					25,000
			0	0	0	0	0	0	0	25,000	0	0	0	0	25,000
			1,500	9,000	1,500	1,500	6,500	500	500	33,000	0	0	0	0	54,000

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year" report.

02/16/2018 Cash Flow Forecast From Pledges (Fiscal 2018) Page 1

All Pledges

Giving Entity	Start	Stop	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Year Total
Musk, Elon	10/01/2017	10/01/2018	1,500	1,500	1,500	1,500	500	500	500	500	0	0	0	0	8,000
Musk, Elon	02/01/2018	02/01/2019	0	6,000	0	0	6,000	0	0	6,000	0	0	0	0	18,000
Musk, Elon	02/01/2018	02/01/2020	0	1,500	0	0	0	0	0	1,500	0	0	0	0	3,000
Musk, Elon	02/01/2018	02/01/2020	0	0	0	0	0	0	0	25,000	0	0	0	0	25,000
			1,500	9,000	1,500	1,500	6,500	500	500	33,000	0	0	0	0	54,000

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year

Description

Designed to be used with a Pledge-based Selection Result, this report layout will group pledges by their payment frequency, then show the expected amount of revenue from pledge payments by month for the next fiscal year.

02/16/2018 — **Cash Flow Forecast From Pledges (Fiscal 2019)** — **Page 1**

All Pledges

Giving Entity	Start	Stop	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Year Total
Payment Frequency: Semester															
Musk, Elon	02/01/2018	02/01/2020		1,500.00						1,500.00					3,000.00
			0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	1,500.00	0.00	0.00	0.00	0.00	3,000.00
Payment Frequency: Yearly															
Musk, Elon	02/01/2018	02/01/2020								25,000.00					25,000.00
			0.00	0.00	0.00	0.00	0.00	0.00	0.00	25,000.00	0.00	0.00	0.00	0.00	25,000.00
			0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	26,500.00	0.00	0.00	0.00	0.00	28,000.00

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year" report.

02/16/2018 Cash Flow Forecast From Pledges (Fiscal 2019) Page 1

All Pledges

Giving Entity	Start	Stop	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	Year Total
Musk, Elon	02/01/2018	02/01/2020	0	1,500	0	0	0	0	0	1,500	0	0	0	0	3,000
Musk, Elon	02/01/2018	02/01/2020	0	0	0	0	0	0	0	25,000	0	0	0	0	25,000
			0	1,500	0	0	0	0	0	26,500	0	0	0	0	28,000

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For Next Year

Description

Designed to be used with a Pledge-based Selection Result, this report layout will group pledges by their payment frequency, then show the expected amount of revenue from pledge payments by month for the next calendar year.

02/16/2018 Cash Flow Forecast From Pledges (Calendar 2019) Page 1

All Pledges

Giving Entity	Start	Stop	January	February	March	April	May	June	July	August	Sept	October	November	December	Year Total
Payment Frequency: Monthly															
Musk, Elon	02/01/2018	02/01/2019	500	500											1,000
			500	500	0	0	0	0	0	0	0	0	0	0	1,000
Payment Frequency: Quarterly															
Musk, Elon	02/01/2018	02/01/2019		6,000											6,000
			0	6,000	0	0	0	0	0	0	0	0	0	0	6,000
Payment Frequency: Semester															
Musk, Elon	02/01/2018	02/01/2020		1,500						1,500					3,000
			0	1,500	0	0	0	0	0	1,500	0	0	0	0	3,000
Payment Frequency: Yearly															
Musk, Elon	02/01/2018	02/01/2020		25,000											25,000
			0	25,000	0	0	0	0	0	0	0	0	0	0	25,000
			500	33,000	0	0	0	0	0	1,500	0	0	0	0	35,000

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For Next Year (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Forecast From Pledges For Next Year" report.

02/16/2018 Cash Flow Forecast From Pledges (Summary, Calendar 2019) Page 1

Frequency	January	February	March	April	May	June	July	August	September	October	November	December	Year Total
Monthly	500	500	0	0	0	0	0	0	0	0	0	0	1,000
Quarterly	0	6,000	0	0	0	0	0	0	0	0	0	0	6,000
Semester	0	1,500	0	0	0	0	0	1,500	0	0	0	0	3,000
Yearly	0	25,000	0	0	0	0	0	0	0	0	0	0	25,000
	500	33,000	0	0	0	0	0	1,500	0	0	0	0	35,000

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now

Description

Designed to be used with a Pledge-based Selection Result, this report layout will group pledges by their payment frequency, then show the expected amount of revenue from pledge payments by month for the calendar year, two years from now. There are two additional versions of this report for calendar years which are 3 and 4 years from now.

02/16/2018 **Cash Flow Forecast From Pledges (Calendar 2020)** **Page 1**

All Pledges

Giving Entity	Start	Stop	January	February	March	April	May	June	July	August	September	October	November	December	Year Total
Payment Frequency: Semester															
Musk, Elon	02/01/2018	02/01/2020		1,500											1,500
			0	1,500	0	0	0	0	0	0	0	0	0	0	1,500
Payment Frequency: Yearly															
Musk, Elon	02/01/2018	02/01/2020		25,000											25,000
			0	25,000	0	0	0	0	0	0	0	0	0	0	25,000
			0	26,500	0	0	0	0	0	0	0	0	0	0	26,500

Report Menu Name

Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now" report. There are two additional versions of this report for calendar years which are 3 and 4 years from now.

02/16/2018 | Cash Flow Forecast From Pledges (Calendar 2020) | Page 1

All Pledges

Frequency	January	February	March	April	May	June	July	August	September	October	November	December	Year Total
Semester	0	1,500	0	0	0	0	0	0	0	0	0	0	1,500
Yearly	0	25,000	0	0	0	0	0	0	0	0	0	0	25,000
	0	26,500	0	0	0	0	0	0	0	0	0	0	26,500

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Current Year Jan-Jun

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show projected vs. actual revenue for January through June of the current calendar year. If actual revenue is less than projected (and you are past June of the current calendar year), it means one or more donors are behind on their pledge payments. Pledges which have been written off are automatically excluded.

02/16/2018 Cash Flow Projected/Actual From Pledges Current Year Jan-Jun For 2018 Page 1

Giving Entity	Pledge Start	Pledge Stop	January Projected	January Actual	February Projected	February Actual	March Projected	March Actual	April Projected	April Actual	May Projected	May Actual	June Projected	June Actual
Payment Frequency: Monthly														
Baker, Thomas	01/09/2018	01/09/2018	100.00											
Musk, Elon	02/01/2018	02/01/2019			500.00		500.00		500.00		500.00		500.00	
Musk, Elon	10/01/2017	10/01/2018	1,000.00	1,000.00	1,000.00		1,000.00		1,000.00		1,000.00		1,000.00	
			1,100.00	1,000.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00
Payment Frequency: Quarterly														
Musk, Elon	02/01/2018	02/01/2019			6,000.00						6,000.00			
			0.00	0.00	6,000.00	0.00	0.00	0.00	0.00	0.00	6,000.00	0.00	0.00	0.00
Payment Frequency: Semester														
Musk, Elon	02/01/2018	02/01/2020			1,500.00									
			0.00	0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Payment Frequency: Yearly														
Musk, Elon	02/01/2018	02/01/2020			25,000.0									
			0.00	0.00	25,000.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			1,100.00	1,000.00	34,000.0	0.00	1,500.00	0.00	1,500.00	0.00	7,500.00	0.00	1,500.00	0.00

Report Menu Name

Pledges - Cash Flow Projected - Actual From Pledges Current Year Jan-Jun (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Projected - Actual From Pledges Current Year Jan-Jun (Summary)" report.

02/16/2018 Cash Flow Projected/Actual From Pledges Current Year Jan-Jun (Summary For 2018) Page 1

Payment Frequency	January Projected	January Actual	February Projected	February Actual	March Projected	March Actual	April Projected	April Actual	May Projected	May Actual	June Projected	June Actual
Monthly	1,100.00	1,000.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00
Quarterly	0.00	0.00	6,000.00	0.00	0.00	0.00	0.00	0.00	6,000.00	0.00	0.00	0.00
Semester	0.00	0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Yearly	0.00	0.00	25,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	1,100.00	1,000.00	34,000.00	0.00	1,500.00	0.00	1,500.00	0.00	7,500.00	0.00	1,500.00	0.00

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show projected vs. actual revenue for July through December of the current calendar year. If actual revenue is less than projected (and you are towards the ends of December of the current calendar year), it means one or more donors are behind on their pledge payments. Pledges which have been written off are automatically excluded.

02/16/2018 Cash Flow Projected/Actual From Pledges Current Year July-December For 2018 Page 1

Giving Entity	Pledge Start	Pledge Stop	July Projected	July Actual	August Projected	August Actual	September Projected	September Actual	October Projected	October Actual	November Projected	November Actual	December Projected	December Actual
Payment Frequency: Monthly														
Musk, Elon	02/01/2018	02/01/2019	500.00		500.00		500.00		500.00		500.00		500.00	
Musk, Elon	10/01/2017	10/01/2018	1,000.00		1,000.00		1,000.00		1,000.00					
			1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	500.00	0.00	500.00	0.00
Payment Frequency: Quarterly														
Musk, Elon	02/01/2018	02/01/2019			6,000.00						6,000.00			
			0.00	0.00	6,000.00	0.00	0.00	0.00	0.00	0.00	6,000.00	0.00	0.00	0.00
Payment Frequency: Semester														
Musk, Elon	02/01/2018	02/01/2020			1,500.00									
			0.00	0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Payment Frequency: Yearly														
Musk, Elon	02/01/2018	02/01/2020												
			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			1,500.00	0.00	9,000.00	0.00	1,500.00	0.00	1,500.00	0.00	6,500.00	0.00	500.00	0.00

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December" report.

02/16/2018 | Cash Flow Projected/Actual From Pledges Current Year July-December (Summary For 2018) | Page 1

Payment Frequency	July Projected	July Actual	August Projected	August Actual	September Projected	September Actual	October Projected	October Actual	November Projected	November Actual	December Projected	December Actual
Monthly	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	500.00	0.00	500.00	0.00
Quarterly	0.00	0.00	6,000.00	0.00	0.00	0.00	0.00	0.00	6,000.00	0.00	0.00	0.00
Semester	0.00	0.00	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Yearly	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	1,500.00	0.00	9,000.00	0.00	1,500.00	0.00	1,500.00	0.00	6,500.00	0.00	500.00	0.00

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show projected vs. actual revenue for January through June of the previous calendar year. If actual revenue is less than projected, it means one or more donors were behind on their pledge payments during the period. Pledges which have been written off are automatically excluded.

02/16/2018 Cash Flow Projected/Actual From Pledges Last Year Jan-Jun For 2017 Page 1

Giving Entity	Pledge Start	Pledge Stop	January Projected	January Actual	February Projected	February Actual	March Projected	March Actual	April Projected	April Actual	May Projected	May Actual	June Projected	June Actual
Payment Frequency: Yearly														
Hayward, Justin	03/01/2013	03/31/2017					3,750.00							
			0.00	0.00	0.00	0.00	3,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	3,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun" report.

02/16/2018 Cash Flow Projected/Actual From Pledges Last Year Jan-Jun (Summary For 2018) Page 1

Payment Frequency	January Projected	January Actual	February Projected	February Actual	March Projected	March Actual	April Projected	April Actual	May Projected	May Actual	June Projected	June Actual
Yearly	0.00	0.00	0.00	0.00	3,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	3,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show projected vs. actual revenue for July through December of the previous calendar year. If actual revenue is less than projected, it means one or more donors were behind on their pledge payments during the period. Pledges which have been written off are automatically excluded.

02/16/2018 Cash Flow Projected/Actual From Pledges Last Year July-December (2017) Page 1

Giving Entity	Pledge Start	Pledge Stop	July Projected	July Actual	August Projected	August Actual	September Projected	September Actual	October Projected	October Actual	November Projected	November Actual	December Projected	December Actual
Payment Frequency: Monthly														
Musk, Elon	10/01/2017	10/01/2018							1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
			0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
			0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00

Report Menu Name

Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December (Summary)

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December" report.

02/16/2018 Cash Flow Projected/Actual From Pledges Last Year July-December (Summary For 2017) Page 1

Payment Frequency	July Projected	July Actual	August Projected	August Actual	September Projected	September Actual	October Projected	October Actual	November Projected	November Actual	December Projected	December Actual
Monthly	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
	0.00	0.00	0.00	0.00	0.00	0.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00

Report Menu Name

Pledges - Grouped By Appeal

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail and totals by pledge appeal. Pledges which have been written off will automatically be filtered out.

03/04/2018 **Pledges - Grouped By Appeal** **Page 1**

All Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Stimulus	Type	Paid	Balance	Past Due
Appeal:											
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00
20	Burke, James	03/05/1998	03/05/1999	9,600.00	800.00	Monthly	98SA	GP	9,600.00	0.00	0.00
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00
		03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00
		03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00
		05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69
		03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	0.00
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	0.00
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	0.00
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	500.00
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	1,000.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00	0.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				196,110.69	70,991.53				38,360.00	157,750.69	68,200.69
Appeal: AM1											
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00
				1,000.00	500.00				500.00	500.00	500.00
Appeal: Appeal Mailing 1											
32	Intrepid Systems Inc.	09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00
				2,200.00	183.34				0.00	2,200.00	2,200.00
Appeal: APPEAL2											
15	Baker, Thomas	02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00
				2,000.00	83.34				0.00	2,000.00	2,000.00

Report Menu Name

Pledges - Grouped By Fund

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail and totals by pledge fund. Pledges which have been written off will automatically be filtered out.

03/04/2018 **Pledges - Grouped By Fund** **Page 1**

All Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Stimulus	Type	Paid	Balance	Past Due
Fund:											
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00
20	Burke, James	03/05/1998	03/05/1999	9,600.00	800.00	Monthly	98SA	GP	9,600.00	0.00	0.00
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00
		03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00
		03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00
		05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69
		03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00	0.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				98,110.69	36,991.53				34,360.00	63,750.69	66,700.69
Fund: Building Fund											
15	Baker, Thomas	02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00
				2,000.00	83.34				0.00	2,000.00	2,000.00
Fund: Music Fund											
53	Musk, Elon	02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	500.00
				6,000.00	500.00				0.00	6,000.00	500.00
Fund: Science, Technology, Engineering, Math Studies Program											
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	0.00
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	0.00
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	0.00
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	1,000.00
				92,000.00	33,500.00				4,000.00	88,000.00	1,000.00

Report Menu Name

Pledges - Grouped By Payment Frequency

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail with totals by payment frequency.

03/04/2018 **Pledges - Grouped By Payment Frequency** **Page 1**

All Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Pledge Stim	Type	Paid	Balance	Past Due
Payment Freq: Monthly											
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00
		02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00
20	Burke, James	03/05/1998	03/05/1999	9,600.00	800.00	Monthly	98SA	GP	9,600.00	0.00	0.00
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00
12	Hayward, Justin	03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00
		03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00
		09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00
		03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00
53	Musk, Elon	02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	1,000.00
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	2,000.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				73,260.00	6,757.52				33,660.00	39,600.00	31,550.00
Payment Freq: Quarterly											
53	Musk, Elon	02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	6,000.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
				26,400.00	6,600.00				1,200.00	25,200.00	7,200.00
Payment Freq: Semester											
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00
53	Musk, Elon	02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00	0.00
				10,000.00	3,500.00				3,500.00	6,500.00	2,000.00
Payment Freq: Yearly											
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00
32	Intrepid Systems Inc.	05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	25,000.00
				91,650.69	54,900.69				500.00	91,150.69	66,150.69

Report Menu Name

Pledges - Grouped By Payment Frequency - Summary

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Grouped By Payment Frequency" report.

02/16/2018 **Pledges - Grouped By Payment Frequency - Summary** Page 1

All Pledges

Payment Frequency	Amount	Paid	Balance	Count
Monthly	73,260.00	33,860.00	39,400.00	20
Quarterly	26,400.00	1,200.00	25,200.00	2
Semester	10,000.00	3,500.00	6,500.00	3
Yearly	91,650.69	500.00	91,150.69	4
	201,310.69	39,060.00	162,250.69	29

Report Menu Name

Pledges - Grouped By Stimulus

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail totaled by pledge stimulus. Pledges which have been written off will automatically be filtered out.

02/16/2018 Pledges - Grouped By Stimulus Page 3

All Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Pledge Stim	Type	Paid	Balance	Past Due
Stimulus: Car Fleet Electrification											
53	Musk, Elon	02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00
				6,000.00	1,500.00				0.00	6,000.00	1,500.00
Stimulus: Music Education											
53	Musk, Elon	02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	500.00
				6,000.00	500.00				0.00	6,000.00	500.00
Stimulus: Science Endowment											
53	Musk, Elon	10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	1,000.00
				12,000.00	1,000.00				4,000.00	8,000.00	1,000.00
Stimulus: Unsolicited											
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
				3,400.00	1,100.00				1,700.00	1,700.00	1,700.00
				201,310.69	71,758.21				39,060.00	162,250.69	105,400.69

Report Menu Name

Pledges - Grouped By Stimulus - Summary

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Grouped By Stimulus" report.

02/16/2018 Pledges - Grouped By Stimulus - Summary Page 1

All Pledges

Pledge Stimulus	Description	Amount	Paid	Balance	Count
		3,950.00	750.00	3,200.00	4
06AC	2006 Annual Campaign	3,000.00	0.00	3,000.00	2
07AC	2007 Annual Campaign	4,010.00	3,510.00	500.00	2
09AC	2009 Annual Campaign	12,000.00	2,000.00	10,000.00	1
11AC	2011 Annual Campaign	1,200.00	0.00	1,200.00	1
13AC	2013 Annual Campaign	15,000.00	0.00	15,000.00	1
14AC	2014 Annual Campaign	100.00	0.00	100.00	1
97AC	97AC	12,200.00	4,350.00	7,850.00	4
98AC	98AC	1,200.00	1,200.00	0.00	1
98SA	98SA	15,600.00	12,600.00	3,000.00	3
99SA	99SA	6,000.00	8,950.00	-2,950.00	1
APPLE	Apple Mac Fleet Upgrade	50,000.00	0.00	50,000.00	1
AP	Automation Projects	24,000.00	0.00	24,000.00	1
BFP	BFP	25,650.69	0.00	25,650.69	1
CFE	Car Fleet Electrification	6,000.00	0.00	6,000.00	1
ME	Music Education	6,000.00	0.00	6,000.00	1
SE	Science Endowment	12,000.00	4,000.00	8,000.00	1
UNSOL	Unsolicited	3,400.00	1,700.00	1,700.00	2
		201,310.69	39,060.00	162,250.69	29

Report Menu Name

Pledges - Grouped By Type

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail totaled by pledge type. Pledges which have been written off will automatically be filtered out.

03/04/2018 **Pledges - Grouped By Type** Page 1

All Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Pledge Stim	Type	Paid	Balance	Past Due
Pledge Type:											
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00
15	Baker, Thomas	09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00
12	Hayward, Justin	03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00
32	Intrepid Systems Inc.	05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
				39,610.69	27,841.53				14,410.00	25,200.69	28,150.69
Pledge Type: AC											
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				13,400.00	1,150.00				4,150.00	9,250.00	9,250.00
Pledge Type: Cash Donation											
15	Baker, Thomas	02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	25,000.00
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	6,000.00
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	1,000.00
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	2,000.00
				101,100.00	34,266.68				4,000.00	97,100.00	38,600.00
Pledge Type: Check											
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00
		03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00
32	Intrepid Systems Inc.	09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00
				29,200.00	5,350.00				2,500.00	26,700.00	26,700.00

Report Menu Name

Pledges - Grouped By Type - Summary

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show just the totals from the, "Pledges - Grouped By Type" report.

02/16/2018 | Pledges - Grouped By Type - Summary | Page 1

All Pledges

Pledge Type	Description	Amount	Paid	Balance	Count
		39,610.69	14,610.00	25,000.69	8
AC	AC	13,400.00	4,150.00	9,250.00	5
CA	Cash Donation	101,100.00	4,000.00	97,100.00	8
CK	Check	29,200.00	2,500.00	26,700.00	4
GP	GP	18,000.00	13,800.00	4,200.00	4
		201,310.69	39,060.00	162,250.69	29

Report Menu Name

Pledges - Outstanding Pledges

Description

Designed to be run directly or used with a Pledge-based Selection Result, this report layout will show pledge detail with totals by donor. Pledges which have been written off will automatically be filtered out.

02/16/2018 Pledges - Outstanding Pledges Page 2

Pledges Which Are Outstanding

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Pldg Stim	Type	Paid	Balance	Past Due
53	Musk, Elon	10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	1,000.00
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	500.00
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	6,000.00
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00
		02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	25,000.00
				98,000.00	34,000.00				4,000.00	94,000.00	34,000.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
				2,400.00	600.00				1,200.00	1,200.00	1,200.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				9,000.00	750.00				2,250.00	6,750.00	6,750.00
				177,300.69	68,507.37				11,900.00	165,400.69	105,400.69

Report Menu Name

Pledges - Past Due Pledges Only

Description

Designed to be run directly used with a Pledge-based Selection Result, this report layout will show pledge detail with totals by donor. Pledges which have been written off will automatically be filtered out.

02/16/2018 **Pledges - Past Due Pledges Only** Page 1

Pledges Which Are Outstanding And Past Due

ID	Giving Entity	Start	Stop	Amount	Payment	Pay Freq	Stimulus	Type	Paid	Balance	Past Due
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00
				2,000.00	90.00				750.00	1,250.00	1,250.00
15	Baker, Thomas	02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00
		01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00
				3,700.00	683.34				0.00	3,700.00	3,700.00
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00
				1,000.00	500.00				500.00	500.00	500.00
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00
				1,800.00	150.00				600.00	1,200.00	1,200.00
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00
				200.00	50.00				100.00	100.00	100.00
12	Hayward, Justin	03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00
		03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00
				27,000.00	4,750.00				2,000.00	25,000.00	25,000.00
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00
				250.00	250.00				0.00	250.00	250.00
32	Intrepid Systems Inc.	03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00
		05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00
		09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00
		01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00
				30,950.69	26,184.03				0.00	30,950.69	30,950.69
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00
				1,000.00	500.00				500.00	500.00	500.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00
				2,400.00	600.00				1,200.00	1,200.00	1,200.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00
				9,000.00	750.00				2,250.00	6,750.00	6,750.00

Report Menu Name

Pledges - Pledge Detail Report

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show basic pledge detail by donor. Pledges which have been written off will automatically be filtered out.

02/16/2018 **Pledges - Pledge Detail Report** Page 2

Universal Qualification

ID	Giving Entity	Start	Stop	Amount	Pay Amount	Pay Freq	Pledge Stim	Type	Paid	Balance
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00
				1,000.00	500.00				500.00	500.00
53	Musk, Elon	10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00
		02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00
				98,000.00	34,000.00				4,000.00	94,000.00
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00
				2,400.00	600.00				1,200.00	1,200.00
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00
				3,000.00	1,500.00				3,000.00	0.00
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00
				9,000.00	750.00				2,250.00	6,750.00
				201,310.69	71,758.21				39,060.00	162,250.69

Report Menu Name

Pledges - Pledge Detail Report, No Subtotaling

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail with no automatic filtering or subtotaling by donor.

03/04/2018 **Pledges - Pledge Detail Report, No Subtotalling** Page 1

All Pledges

ID	Giving Entity	Start	Stop	Amount	Pay Amt	Pay Freq	Pledge Stim	Type	Paid	Balance	Past Due	Write Off
32	Intrepid Systems Inc.	01/01/2014	02/01/2014	100.00	100.00	Monthly	14AC	CA	0.00	100.00	100.00	No
		09/01/2011	09/01/2012	1,200.00	100.00	Monthly	11AC	CK	0.00	1,200.00	1,200.00	No
		02/01/2006	01/01/2007	1,000.00	83.34	Monthly	06AC	CA	0.00	1,000.00	1,000.00	No
		05/01/2005	05/01/2006	25,650.69	25,650.69	Yearly	BFP		0.00	25,650.69	25,650.69	No
		03/01/2004	03/01/2006	3,000.00	250.00	Monthly	98SA	GP	0.00	3,000.00	3,000.00	No
28	Bach Memorial Account	05/01/2005	01/01/2006	2,000.00	90.00	Monthly			750.00	1,250.00	1,250.00	No
15	Baker, Thomas	01/09/2018	01/09/2018	1,200.00	100.00	Monthly		AC	0.00	1,200.00	1,200.00	No
		09/01/2015	10/01/2015	500.00	500.00	Monthly			0.00	500.00	500.00	No
		02/01/2006	02/01/2007	2,000.00	83.34	Monthly	06AC	CA	0.00	2,000.00	2,000.00	No
		01/09/1998	01/09/1999	1,200.00	100.00	Monthly	98AC	AC	1,200.00	0.00	0.00	No
18	Bowie, Denise	04/11/1999	04/11/2000	6,000.00	500.00	Monthly	99SA		8,950.00	-2,950.00	0.00	No
20	Burke, James	06/01/2007	06/01/2008	1,000.00	500.00	Semester	07AC	CK	500.00	500.00	500.00	No
		03/05/1998	03/05/1999	9,600.00	800.00	Monthly	98SA	GP	9,600.00	0.00	0.00	No
11	Decca Records	10/09/2002	10/09/2003	1,800.00	150.00	Monthly	97AC	AC	600.00	1,200.00	1,200.00	No
17	Foster, James	09/01/1997	09/01/1998	200.00	50.00	Monthly	97AC	AC	100.00	100.00	100.00	No
4	Gore, Martin L.	10/05/1997	10/05/1998	1,200.00	100.00	Monthly	97AC		1,200.00	0.00	0.00	No
24	IBM Corporation	05/01/1999	05/01/2000	250.00	250.00	Monthly			0.00	250.00	250.00	No
12	Hayward, Justin	03/01/2013	03/31/2017	15,000.00	3,750.00	Yearly	13AC	CK	0.00	15,000.00	15,000.00	No
		03/01/2009	03/01/2010	12,000.00	1,000.00	Monthly	09AC	CK	2,000.00	10,000.00	10,000.00	No
		04/02/2008	03/01/2009	11,000.00	1,000.00	Monthly	08AC		11,000.00	0.00	0.00	Yes
		03/01/2007	03/01/2008	3,010.00	250.84	Monthly	07AC		3,010.00	0.00	0.00	No
3	Trek Foundation	02/02/1998	02/02/1999	3,000.00	1,500.00	Semester	98SA	GP	3,000.00	0.00	0.00	No
5	Mozart Memorial Account	04/01/2001	04/01/2003	1,000.00	500.00	Yearly	UNSOL		500.00	500.00	500.00	No
53	Musk, Elon	02/01/2018	02/01/2020	50,000.00	25,000.00	Yearly	APPLE	CA	0.00	50,000.00	25,000.00	No
		02/01/2018	02/01/2020	6,000.00	1,500.00	Semester	CFE	CA	0.00	6,000.00	1,500.00	No
		02/01/2018	02/01/2019	24,000.00	6,000.00	Quarterly	AP	CA	0.00	24,000.00	6,000.00	No
		02/01/2018	02/01/2019	6,000.00	500.00	Monthly	ME	CA	0.00	6,000.00	1,000.00	No
		10/01/2017	10/01/2018	12,000.00	1,000.00	Monthly	SE	CA	4,000.00	8,000.00	2,000.00	No
7	Schmidt Aeronautic Foundation	06/05/1998	06/05/1999	2,400.00	600.00	Quarterly	UNSOL	GP	1,200.00	1,200.00	1,200.00	No
10	Waters, Roger	01/09/1997	01/09/1998	9,000.00	750.00	Monthly	97AC	AC	2,250.00	6,750.00	6,750.00	No
				212,310.69	72,758.21				49,860.00	162,450.69	106,900.69	

Report Menu Name

Pledges - Pledge Payment Report

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail by donor with an emphasis on payment status. Actual payment detail is also included. Pledges which have been written off will automatically be filtered out.

02/16/2018 **Pledges - Pledge Payment Report** **Page 2**

Universal Qualification

ID	Giving Entity	Pledge #	Pledge Start	Pledge Amt	Amount Paid	Pledge Link	Gift Date	Gift Amt	Gift Type	Gift Stimulus	Gift Fund
17	Foster, James	1	09/01/1997	200.00	100.00	1	08/29/2012	50.00	CK	12AC	1000
						1	07/29/2012	50.00	CA	12AC	1000
				200.00	100.00						
								100.00			
4	Gore, Martin L.	1	10/05/1997	1,200.00	1,400.00	1	05/03/2013	100.00	CK	13AC	1000
						1	04/11/2013	1,025.00	MC	13AC	1000
				1,200.00	1,400.00	1	02/08/2013	100.00	VC	13AC	1000
						1	10/11/2012	175.00	AE	UNSOL	1000
								1,400.00			
12	Hayward, Justin	1	03/01/2007	3,010.00	3,010.00	1	12/30/2002	1,000.00	CK	02AC	1000
						1	12/02/2002	1,000.00	CK	02AC	1000
						1	11/04/2002	10.00	VC	02AC	1000
						1	10/03/2002	1,000.00	CK	02AC	1000
		4	03/01/2009	12,000.00	2,000.00	4	01/30/2004	1,000.00	CK	04AC	1000
						4	01/01/2004	1,000.00	CK	04AC	1000
		2	03/01/2013	15,000.00	0.00						
								5,010.00			
				30,010.00	5,010.00						
24	IBM Corporation	1	05/01/1999	250.00	0.00						
				250.00	0.00			0.00			
32	Intrepid Systems Inc.	1	03/01/2004	3,000.00	0.00						
		2	05/01/2005	25,650.69	0.00						
		3	02/01/2006	1,000.00	0.00			0.00			
		4	09/01/2011	1,200.00	0.00						
		5	01/01/2014	100.00	0.00						
				30,950.69	0.00						
5	Mozart Memorial Account	1	04/01/2001	1,000.00	500.00	1	09/28/2007	500.00	CA	UNSOL	1000
				1,000.00	500.00			500.00			
53	Musk, Elon	1	10/01/2017	12,000.00	4,000.00	1	01/15/2018	1,000.00	CK	SE	STEMSTUD
						1	12/15/2017	1,000.00	CK	SE	STEMSTUD
						1	11/15/2017	1,000.00	CK	SE	STEMSTUD
						1	10/15/2017	1,000.00	CK	SE	STEMSTUD
		2	02/01/2018	6,000.00	0.00						
		3	02/01/2018	24,000.00	0.00			4,000.00			
		4	02/01/2018	6,000.00	0.00						
		5	02/01/2018	50,000.00	0.00						
				98,000.00	4,000.00						

Report Menu Name

Pledges - Pledge Payment Report With Payments Due Over Next Six Months

Description

Designed to be used with a Pledge-based Selection Result, this report layout will show pledge detail plus the payments to be expected from each pledge over the next six months. Pledges which have no payments due over the next six months, pledges which have been paid off, and pledges which have been written off are automatically excluded.

03/04/2018 **Pledges - Pledge Payment Report With Payments Due Over Next Six Months** Page 1

Donor & Partner	Organization	Address	Amount	Paid	Balance	Last Paid	March	April	May	June	July	August
Payment Frequency: Monthly												
Elon Musk	SpaceX	3141 Tesla Ave.	6,000.00	0.00	6,000.00		500.00	500.00	500.00	500.00	500.00	500.00
			12,000.00	4,000.00	8,000.00	01/15/2018	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
			18,000.00	4,000.00	14,000.00		1,500.00	1,500.00	1,500.00	1,500.00	1,500.00	1,500.00
Payment Frequency: Quarterly												
Elon Musk	SpaceX	3141 Tesla Ave.	24,000.00	0.00	24,000.00				6,000.00			6,000.00
			24,000.00	0.00	24,000.00		0.00	0.00	6,000.00	0.00	0.00	6,000.00
Payment Frequency: Semester												
Elon Musk	SpaceX	3141 Tesla Ave.	6,000.00	0.00	6,000.00							1,500.00
			6,000.00	0.00	6,000.00		0.00	0.00	0.00	0.00	0.00	1,500.00
Payment Frequency: Yearly												
Elon Musk	SpaceX	3141 Tesla Ave.	50,000.00	0.00	50,000.00							
			50,000.00	0.00	50,000.00		0.00	0.00	0.00	0.00	0.00	0.00
			98,000.00	4,000.00	94,000.00		1,500.00	1,500.00	7,500.00	1,500.00	1,500.00	9,000.00

Report Menu Name

Pledges - Pledge Receivables As They Were On A Specific Date

Description

Designed to be used with a Pledge-based Selection Result, this report layout allows you to go back in time to see what was still owed on pledges as of a specific date. To change the specific date, first copy the stock version of this report using the Copy button on the DonorQuest report menu. Give the copy a unique name, then click the Setup button for the copied report layout. Change the date shown in the Initializations blank on the Options tab.

02/16/2018 | **Pledges - Pledge Receivables As They Were On A Specific Date** | Page 1

Universal Qualification

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Remaining Balance To Date	Remaining Balance As Of 01/01/2017	Payment Date	Amount	Stimulus
28	Bach Memorial Account	1	05/01/2005	2,000.00	1,250.00	1,250.00	02/04/2013	250.00	13AC
							01/04/2013	500.00	13AC
				2,000.00	1,250.00	1,250.00			
								750.00	
15	Baker, Thomas	3	01/09/1998	1,200.00	0.00	0.00	05/10/2016	100.00	16AC
							11/06/2015	100.00	15AC
							10/06/2015	100.00	15AC
							09/06/2015	100.00	15AC
							08/06/2015	100.00	15AC
							07/07/2015	100.00	15AC
							06/06/2015	100.00	15AC
							05/06/2015	100.00	15AC
							03/06/2015	100.00	15AC
							02/04/2015	100.00	15AC
							01/04/2015	100.00	15AC
							12/07/2014	100.00	14AC
		1	02/01/2006	2,000.00	2,000.00	2,000.00			
		2	09/01/2015	500.00	500.00	500.00		1,200.00	
				3,700.00	2,500.00	2,500.00			
18	Bowie, Denise	1	04/11/1999	6,000.00	-2,950.00	5,500.00	03/09/2015	500.00	15AC
				6,000.00	-2,950.00	5,500.00		500.00	
20	Burke, James	1	03/05/1998	9,600.00	0.00	800.00	12/03/2013	800.00	13AC
							11/02/2013	800.00	13AC
							10/02/2013	800.00	13AC
							09/02/2013	800.00	13AC
							08/02/2013	800.00	13AC
							07/03/2013	800.00	13AC
							06/02/2013	800.00	13AC
							05/02/2013	800.00	13AC
							04/02/2013	800.00	13AC
							03/02/2013	800.00	13AC
							01/31/2013	800.00	13AC
		2	06/01/2007	1,000.00	500.00	500.00	02/24/2016	500.00	16AC
				10,600.00	500.00	1,300.00		9,300.00	
11	Decca Records	2	10/09/2002	1,800.00	1,200.00	1,200.00	12/09/2012	150.00	12AC
							11/08/2012	150.00	12AC
				1,800.00	1,200.00	1,200.00	10/07/2012	150.00	12AC
							09/06/2012	150.00	12AC
								600.00	
17	Foster, James	1	09/01/1997	200.00	100.00	100.00	08/29/2012	50.00	12AC
							07/29/2012	50.00	12AC
				200.00	100.00	100.00			
								100.00	

Report Menu Name

Pledges - Pledge Receivables At End Of Calendar Year, 1 Year Ago

Description

Designed to be run directly or used with a Pledge-based Selection Result, this report layout will show pledge receivables by donor as of the end of the previous calendar year. All payments for each pledge are also shown. This report will automatically filter pledges so that only pledges from the previous calendar year are included.

02/16/2018 **Pledges - Pledge Receivables At End Of Calendar Year, 1 Year Ago** Page 3

All Pledges

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Remaining Balance To Date	RB By Year End 2017	Payment Date	Amount	Stimulus
53	Musk, Elon	1	10/01/2017	12,000.00	8,000.00	9,000.00	12/15/2017	1,000.00	SE
							11/15/2017	1,000.00	SE
				12,000.00	8,000.00	9,000.00	10/15/2017	1,000.00	SE
								3,000.00	
7	Schmidt Aeronautic Foundation	1	06/05/1998	2,400.00	1,200.00	1,200.00	01/05/2017	600.00	UNSOL
							10/02/2013	600.00	UNSOL
				2,400.00	1,200.00	1,200.00			
								1,200.00	
3	Trek Foundation	1	02/02/1998	3,000.00	0.00	0.00	11/30/2013	1,500.00	13AC
							05/30/2013	1,500.00	13AC
				3,000.00	0.00	0.00			
								3,000.00	
10	Waters, Roger	1	01/09/1997	9,000.00	6,750.00	6,750.00	01/11/2013	750.00	MUSIC
							02/05/2012	750.00	12AC
							01/05/2012	750.00	MUSIC
				9,000.00	6,750.00	6,750.00		2,250.00	
				125,110.69	75,050.69	76,050.69		49,060.00	

Report Menu Name

Pledges - Pledge Receivables At End Of Calendar Year, 2 Years Ago

Description

Designed to be run directly or used with a Pledge-based Selection Result, this report layout will show pledge receivables by donor as of the end of the calendar year, two years ago. All payments for each pledge are also shown. This report will automatically filter pledges so that only pledges from the calendar year two years ago are included.

02/16/2018 **Pledges - Pledge Receivables At End Of Calendar Year, 2 Years Ago** **Page 2**

All Pledges

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Remaining Balance To Date	RB By Year End 2016	Payment Date	Pay Amount	Pay Stimulus
4	Gore, Martin L.	1	10/05/1997	1,200.00	0.00	0.00	04/11/2013	1,025.00	13AC
							10/11/2012	175.00	UNSOL
				1,200.00	0.00	0.00			
								1,200.00	
12	Hayward, Justin	2	03/01/2013	15,000.00	15,000.00	15,000.00			
		4	03/01/2009	12,000.00	10,000.00	10,000.00	01/30/2004	1,000.00	04AC
							01/01/2004	1,000.00	04AC
		3	04/02/2008	11,000.00	0.00	0.00	12/02/2003	1,000.00	03AC
							11/05/2003	1,000.00	03AC
							10/03/2003	1,000.00	03AC
							09/16/2003	1,000.00	03AC
							08/01/2003	1,000.00	03AC
							07/02/2003	1,000.00	03AC
							06/01/2003	1,000.00	03AC
							05/01/2003	1,000.00	03AC
							04/06/2003	1,000.00	03AC
							03/04/2003	1,000.00	03AC
							01/31/2003	1,000.00	03AC
		1	03/01/2007	3,010.00	0.00	0.00	12/30/2002	1,000.00	02AC
							12/02/2002	1,000.00	02AC
				41,010.00	25,000.00	25,000.00	11/04/2002	10.00	02AC
							10/03/2002	1,000.00	02AC
								16,010.00	
24	IBM Corporation	1	05/01/1999	250.00	250.00	250.00			
				250.00	250.00	250.00		0.00	
32	Intrepid Systems Inc.	5	01/01/2014	100.00	100.00	100.00			
		4	09/01/2011	1,200.00	1,200.00	1,200.00			
		3	02/01/2006	1,000.00	1,000.00	1,000.00		0.00	
		2	05/01/2005	25,650.69	25,650.69	25,650.69			
		1	03/01/2004	3,000.00	3,000.00	3,000.00			
				30,950.69	30,950.69	30,950.69			
5	Mozart Memorial Account	1	04/01/2001	1,000.00	500.00	500.00	09/28/2007	500.00	UNSOL
				1,000.00	500.00	500.00		500.00	
7	Schmidt Aeronautic Foundation	1	06/05/1998	2,400.00	1,200.00	1,800.00	10/02/2013	600.00	UNSOL
				2,400.00	1,200.00	1,800.00		600.00	
3	Trek Foundation	1	02/02/1998	3,000.00	0.00	0.00	11/30/2013	1,500.00	13AC
							05/30/2013	1,500.00	13AC
				3,000.00	0.00	0.00			
								3,000.00	
10	Waters, Roger	1	01/09/1997	9,000.00	6,750.00	6,750.00	01/11/2013	750.00	MUSIC
							02/05/2012	750.00	12AC
							01/05/2012	750.00	MUSIC

Report Menu Name

Pledges - Pledge Receivables At End Of Fiscal Year, 1 Year Ago

Description

Designed to be run directly or used with a Pledge-based Selection Result, this report layout will show pledge receivables by donor as of the end of the previous calendar fiscal. All payments for each pledge are also shown. This report will automatically filter pledges so that only pledges from the previous fiscal year are included.

03/04/2018 **Pledges - Pledge Receivables At End Of Fiscal Year, 1 Year Ago** Page 1

All Pledges

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Remaining Balance To Date	RB By Year End 2017	Payment Date	Amount	Stimulus
28	Bach Memorial Account	1	05/01/2005	2,000.00	1,250.00	1,250.00	02/04/2013	250.00	13AC
							01/04/2013	500.00	13AC
				2,000.00	1,250.00	1,250.00			
								750.00	
15	Baker, Thomas	2	09/01/2015	500.00	500.00	500.00			
		1	02/01/2006	2,000.00	2,000.00	2,000.00			
								0.00	
				2,500.00	2,500.00	2,500.00			
18	Bowie, Denise	1	04/11/1999	6,000.00	-2,950.00	-2,950.00	03/31/2017	8,450.00	17AC
							03/09/2015	500.00	15AC
				6,000.00	-2,950.00	-2,950.00			
								8,950.00	
20	Burke, James	2	06/01/2007	1,000.00	500.00	500.00	02/24/2016	500.00	16AC
		1	03/05/1998	9,600.00	0.00	800.00	12/03/2013	800.00	13AC
							11/02/2013	800.00	13AC
				10,600.00	500.00	1,300.00	10/02/2013	800.00	13AC
							09/02/2013	800.00	13AC
							08/02/2013	800.00	13AC
							07/03/2013	800.00	13AC
							06/02/2013	800.00	13AC
							05/02/2013	800.00	13AC
							04/02/2013	800.00	13AC
							03/02/2013	800.00	13AC
							01/31/2013	800.00	13AC
								9,300.00	
11	Decca Records	2	10/09/2002	1,800.00	1,200.00	1,200.00	12/09/2012	150.00	12AC
							11/08/2012	150.00	12AC
				1,800.00	1,200.00	1,200.00	10/07/2012	150.00	12AC
							09/06/2012	150.00	12AC
								600.00	
17	Foster, James	1	09/01/1997	200.00	100.00	100.00	08/29/2012	50.00	12AC
							07/29/2012	50.00	12AC
				200.00	100.00	100.00			
								100.00	
12	Hayward, Justin	2	03/01/2013	15,000.00	15,000.00	15,000.00			
		4	03/01/2009	12,000.00	10,000.00	10,000.00	01/30/2004	1,000.00	04AC
							01/01/2004	1,000.00	04AC
				27,000.00	25,000.00	25,000.00			
								2,000.00	
24	IBM Corporation	1	05/01/1999	250.00	250.00	250.00			
				250.00	250.00	250.00		0.00	

Report Menu Name

Pledges - Pledge Receivables At End Of Fiscal Year, 2 Years Ago

Description

Designed to be run directly or used with a Pledge-based Selection Result, this report layout will show pledge receivables by donor as of the end of the fiscal two years ago. All payments for each pledge are also shown. This report will automatically filter pledges so that only pledges from the fiscal year two years ago are included.

03/04/2018 | **Pledges - Pledge Receivables At End Of Fiscal Year, 2 Years Ago** | Page 1

All Pledges

ID	Giving Entity	Pledge ID	Pledge Start	Pledge Amt	Remaining Balance To Date	RB By Year End 2016	Payment Date	Pay Amount	Pay Stimulus
28	Bach Memorial Account	1	05/01/2005	2,000.00	1,250.00	1,250.00	02/04/2013	250.00	13AC
							01/04/2013	500.00	13AC
				2,000.00	1,250.00	1,250.00			
								750.00	
15	Baker, Thomas	2	09/01/2015	500.00	500.00	500.00			
		1	02/01/2006	2,000.00	2,000.00	2,000.00			
								0.00	
				2,500.00	2,500.00	2,500.00			
18	Bowie, Denise	1	04/11/1999	6,000.00	-2,950.00	5,500.00	03/09/2015	500.00	15AC
				6,000.00	-2,950.00	5,500.00		500.00	
20	Burke, James	2	06/01/2007	1,000.00	500.00	500.00	02/24/2016	500.00	16AC
		1	03/05/1998	9,600.00	0.00	800.00	12/03/2013	800.00	13AC
							11/02/2013	800.00	13AC
				10,600.00	500.00	1,300.00	10/02/2013	800.00	13AC
							09/02/2013	800.00	13AC
							08/02/2013	800.00	13AC
							07/03/2013	800.00	13AC
							06/02/2013	800.00	13AC
							05/02/2013	800.00	13AC
							04/02/2013	800.00	13AC
							03/02/2013	800.00	13AC
							01/31/2013	800.00	13AC
								9,300.00	
11	Decca Records	2	10/09/2002	1,800.00	1,200.00	1,200.00	12/09/2012	150.00	12AC
							11/08/2012	150.00	12AC
				1,800.00	1,200.00	1,200.00	10/07/2012	150.00	12AC
							09/06/2012	150.00	12AC
								600.00	
17	Foster, James	1	09/01/1997	200.00	100.00	100.00	08/29/2012	50.00	12AC
							07/29/2012	50.00	12AC
				200.00	100.00	100.00			
								100.00	
12	Hayward, Justin	2	03/01/2013	15,000.00	15,000.00	15,000.00			
		4	03/01/2009	12,000.00	10,000.00	10,000.00	01/30/2004	1,000.00	04AC
							01/01/2004	1,000.00	04AC
				27,000.00	25,000.00	25,000.00			
								2,000.00	
24	IBM Corporation	1	05/01/1999	250.00	250.00	250.00			
				250.00	250.00	250.00		0.00	

Report Menu Name

Pledges - Pledge Summary Report By Donor

Description

Designed to be used with a Pledge-based Selection Result, for each donor this report layout will simply show total amount pledged, paid to date, balance remaining, and pledge count. Pledges which have been written off will automatically be filtered out.

02/16/2018 **Pledges - Pledge Summary Report By Donor** Page 1

All Pledges

ID	Giving Entity	Amount	Paid	Balance	Count
28	Bach Memorial Account	2,000.00	750.00	1,250.00	1
15	Baker, Thomas	4,900.00	1,200.00	3,700.00	4
18	Bowie, Denise	6,000.00	8,950.00	-2,950.00	1
20	Burke, James	10,600.00	10,100.00	500.00	2
11	Decca Records	1,800.00	600.00	1,200.00	1
17	Foster, James	200.00	100.00	100.00	1
4	Gore, Martin L.	1,200.00	1,200.00	0.00	1
12	Hayward, Justin	30,010.00	5,010.00	25,000.00	3
24	IBM Corporation	250.00	0.00	250.00	1
32	Intrepid Systems Inc.	30,950.69	0.00	30,950.69	5
5	Mozart Memorial Account	1,000.00	500.00	500.00	1
53	Musk, Elon	98,000.00	4,000.00	94,000.00	5
7	Schmidt Aeronautic Foundation	2,400.00	1,200.00	1,200.00	1
3	Trek Foundation	3,000.00	3,000.00	0.00	1
10	Waters, Roger	9,000.00	2,250.00	6,750.00	1
		201,310.69	38,860.00	162,450.69	29

8.4 Sample Memo Reports

Report Menu Name

Memos - Grouped By Memo Code

Description

Designed to be used with a Memo-based Selection Result, this report layout will show memo detail by memo code description.

02/16/2018 **Memos - Grouped By Memo Code** **Page 1**

Memos With Defined Codes

ID	Giving Entity	Memo Code	Memo Text
Code: Address Line 3			
32	Intrepid Systems Inc.	ADDR3	3rd Address Line Can Go Here
Code: Custom Memo Code			
32	Intrepid Systems Inc.	CUSTOM	Memos can be used to add additional fields and information
Code: Donor's Favorite Music Album			
12	Hayward, Justin	FAV_ALBUM	Days of Future Passed
Code: Favorite Country			
12	Hayward, Justin	FAVCOUNTRY	Norway
Code: Favorite Food			
23	Lodge, John	FOOD	Swedish
Code: Hobby			
12	Hayward, Justin	HOBBY	Justin loves to play guitar and compose music on Tuesday Afternoons.
		HOBBY	Composing Symphonic Works.
23	Lodge, John	HOBBY	Justin loves to play guitar and compose music on Tuesday Afternoons.
Code: Home Town			
12	Hayward, Justin	HMTOWN	London, England
23	Lodge, John	HMTOWN	London, England
Code: Musical Taste			
12	Hayward, Justin	MUSIC	Alternative, Progressive, and Classic Rock
		MUSIC	Mainly Classical
23	Lodge, John	MUSIC	Modern / Alternative Rock & Classic Rock.

Report Menu Name

Memos - Grouped By Memo Code - Summary

Description

Designed to be used with a Memo-based Selection Result, this report layout will show a count of each unique memo code.

02/16/2018 **Memos - Grouped By Memo Code - Summary** Page 1

Memos With Defined Codes

Memo Code	Description	Count
ADDR3	Address Line 3	1
CUSTOM	Custom Memo Code	1
FAVCOUNTRY	Favorite Country	1
FAV_ALBUM	Donor's Favorite Music Album	1
FOOD	Favorite Food	1
HMTOWN	Home Town	2
HOBBY	Hobby	3
MUSIC	Musical Taste	3
S000003	S000003	20
S000004	S000004	21
S000005	S000005	1
TGERMANY	Traveled to germany	1
		56

Report Menu Name

Memos - Memo Detail Report

Description

Designed to be used with a Donation-based Selection Result, this report layout will show memos grouped by the constituent to which they belong.

02/16/2018 **Memos - Memo Detail Report** **Page 1**

Memos With Defined Codes

Memo Code	Memo Text
MEMOS FOR: 1984 Productions, 6	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Baker, Thomas, 15	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Bowie, Denise, 18	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Burke, James, 20	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Decca Records, 11	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Foster, James, 17	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Gore, Martin L., 4	
S000003	04/03/2017; 17AC; 17ACA1; Sent to mailing house on 03/30/2017
S000004	03/17/2017; 17AC; 17ACA1; Demo
MEMOS FOR: Hayward, Justin, 12	
FAVCOUNTRY	Norway
FAV_ALBUM	Days of Future Passed
HMTOWN	London, England
HOBBY	Justin loves to play guitar and compose music on Tuesday Afternoons.
MUSIC	Alternative, Progressive, and Classic Rock

8.5 Sample Extra Address Reports

Report Menu Name

Extra Address - Basic Fields

Description

Designed to be used with an Extra Address-based Selection Result, this report layout will show extra address detail of the basic extra address fields.

02/19/2018 **Extra Address - Basic Fields** Page 1

All Extra Addresses

XA Last Name	XA First Name	XA Address	XA Address2	XA City	XA State	XA Zip	XA Start Date	XA End Date	XA Salutation	XA EMail
Anderson	Brad	2601 Elliott Ave	Suite 3109	Seattle	WA	98121	01/01/2018	06/30/2018	Brad Anderson	BradA@gmail.com
Harrison	Timothy	586 Horizon Ave.		Schenectady	NY	12345-6789			Mr. Harrison	TimothyH@gmail.com
Harrison	Timothy	31415 Computation Dr.		Springbrook	WI	54875-6431			Mr. Harrison	
Hayward	Justin	54321 Blue Sea Way		San Diego	CA	92105	09/01/2018	12/01/2018	Justin Hayward	
Hayward	Justin	1234 Sunny Way		Los Angeles	CA	90001-6789	06/01/2018	09/01/2018	Justin Hayward	
Hayward	Justin	123 Summit Way	Apt. 200	Seattle	WA	98109	12/01/2018	02/28/2018	Justin Hayward	
John	Lodge	1234 Cosmic Way Under T		Los Angeles	CA	90001-6789	03/01/2018	05/31/2018	Mr. Hayward	JustinH@Threshold.com

Report Menu Name

Extra Address - Basic Fields, Grouped By Extra Address Code

Description

Designed to be used with an Extra Address-based Selection Result, this report layout will show extra address detail by the description of each extra address code.

02/19/2018 Extra Address - Basic Fields, Grouped By Extra Address Code Page 1

All Extra Addresses

XA Last Name	XA First Name	XA Address	XA Address2	XA City	XA State	XA Zip	XA Start Date	XA End Date	XA Salutation	XA EMail
- Fall Seasonal Address:										
Hayward	Justin	54321 Blue Sea Way		San Diego	CA	92105	09/01/2018	12/01/2018	Justin Hayward	
- Newsletter Mailing Address:										
Harrison	Timothy	586 Horizon Ave.		Schenectady	NY	12345-6789			Mr. Harrison	TimothyH@gmail.com
Harrison	Timothy	31415 Computation Dr.		Springbrook	WI	54875-6431			Mr. Harrison	
- Spring Home:										
John	Lodge	1234 Cosmic Way Under T		Los Angeles	CA	90001-6789	03/01/2018	05/31/2018	Mr. Hayward	JustinH@Threshold.com
- Summer Home:										
Anderson	Brad	2601 Elliott Ave	Suite 3109	Seattle	WA	98121	01/01/2018	06/30/2018	Brad Anderson	BradA@gmail.com
Hayward	Justin	1234 Sunny Way		Los Angeles	CA	90001-6789	06/01/2018	09/01/2018	Justin Hayward	
- Winter Home:										
Hayward	Justin	123 Summit Way	Apt. 200	Seattle	WA	98109	12/01/2018	02/28/2018	Justin Hayward	

Report Menu Name

Extra Address - Basic Fields, Grouped By Zip Code

Description

Designed to be used with an Extra Address-based Selection Result, this report layout will show the basic extra address fields grouped by the zip code for each extra address.

02/19/2018 **Extra Address - Basic Fields, Grouped By Zip Code** Page 1

All Extra Addresses

XA Last Name	XA First Name	XA Address	XA Address2	XA City	XA State	XA Start Date	XA End Date	XA Salutation	XA EMail
- 12345:									
Harrison	Timothy	586 Horizon Ave.		Schenectady	NY			Mr. Harrison	TimothyH@gmail.com
- 54875:									
Harrison	Timothy	31415 Computation Dr.		Springbrook	WI			Mr. Harrison	
- 90001:									
Hayward	Justin	1234 Sunny Way		Los Angeles	CA	06/01/2018	09/01/2018	Justin Hayward	
John	Lodge	1234 Cosmic Way Under The		Los Angeles	CA	03/01/2018	05/31/2018	Mr. Hayward	JustinH@Threshold.com
- 92105:									
Hayward	Justin	54321 Blue Sea Way		San Diego	CA	09/01/2018	12/01/2018	Justin Hayward	
- 98109:									
Hayward	Justin	123 Summit Way	Apt. 200	Seattle	WA	12/01/2018	02/28/2018	Justin Hayward	
- 98121:									
Anderson	Brad	2601 Elliott Ave	Suite 3109	Seattle	WA	01/01/2018	06/30/2018	Brad Anderson	BradA@gmail.com

Report Menu Name

Extra Address - Zip Code Counts

Description

Designed to be used with an Extra Address-based Selection Result, this report layout will show a count of the number of extra addresses for each zip code.

02/19/2018 **Extra Address - Zip Code Counts** **Page 1**

All Extra Addresses

Zip	State	Count
12345	NY	1
54875	WI	1
90001	CA	2
92105	CA	1
98109	WA	1
98121	WA	1
		7

8.6 Sample Linkage Reports

Report Menu Name

Linkages - Linked Donor Report

Description

Designed to be used with a Linkage-based Selection Result, this report layout will show linkage detail by constituent.

02/16/2018 Linkages - Linked Donor Report Page 1
All Linkages

ID	Donor Type	Giving Entity	Linkage	Description	Linked To:
15	Individual	Baker, Thomas	FRIEND	Friend	Hayward, Justin
			MG50	Matching Gift 50%	IBM Corporation
12	Individual	Hayward, Justin	CLASSI	Classical Influence	Bach Memorial Account
			FRIEND	Friend	Baker, Thomas
			FRIEND	Friend	Northern Songs Limited, (U.S. Division)
			MG50	Matching Gift 50%	Decca Records
24	Corporation	IBM Corporation	EMPLOYEE	Employee	Intrepid Systems Inc.
			EMPLOYEE	Employee	Baker, Thomas
			EMPLOYEE	Employee	Hayward, Justin
32	Corporation	Intrepid Systems Inc.	FRIEND	Friend	Burke, James
			MG50	Matching Gift 50%	IBM Corporation
21	Individual	Knight, Paula	MG50	Matching Gift 50%	IBM Corporation
23	Individual	Lodge, John	FRIEND	Friend	Hayward, Justin
			HIW	Had Influence With	Lodge, John
5	Memorial Record	Mozart Memorial Account	HIW	Had Influence With	Lodge, John
			HIW	Had Influence With	Hayward, Justin
29	Corporation	Northern Songs Limited, (U.S. Division)	FRIEND	Friend	Hayward, Justin

Report Menu Name

Linkages - Linked Donor Report With Current Calendar Year Totals

Description

Designed to be used with a Linkage-based Selection Result, this report layout will show linkage detail by constituent to include total giving in the current calendar year for each linked constituent.

02/16/2018 | Linkages - Linked Donor Report With Current Calendar Year Totals | Page 1

All Linkages

ID	Donor Type	Giving Entity	Linkage	Description	Linked To:	2018 Total
15	Individual	Baker, Thomas	FRIEND	Friend	Hayward, Justin	0.00
			MG50	Matching Gift 50%	IBM Corporation	0.00
						0.00
12	Individual	Hayward, Justin	CLASSI	Classical Influence	Bach Memorial Account	0.00
			FRIEND	Friend	Baker, Thomas	0.00
			FRIEND	Friend	Northern Songs Limited, (	0.00
			MG50	Matching Gift 50%	Decca Records	50.00
						50.00
24	Corporation	IBM Corporation	EMPLOYEE	Employee	Intrepid Systems Inc.	500.00
			EMPLOYEE	Employee	Baker, Thomas	0.00
			EMPLOYEE	Employee	Hayward, Justin	0.00
						500.00
32	Corporation	Intrepid Systems Inc.	FRIEND	Friend	Burke, James	0.00
			MG50	Matching Gift 50%	IBM Corporation	0.00
						0.00
21	Individual	Knight, Paula	MG50	Matching Gift 50%	IBM Corporation	0.00
						0.00
23	Individual	Lodge, John	FRIEND	Friend	Hayward, Justin	0.00
			HIW	Had Influence With	Lodge, John	0.00
						0.00
5	Memorial Record	Mozart Memorial Account	HIW	Had Influence With	Lodge, John	0.00
			HIW	Had Influence With	Hayward, Justin	0.00
						0.00
29	Corporation	Northern Songs Limited, (U.S. Division)	FRIEND	Friend	Hayward, Justin	0.00
						0.00
						550.00

Report Menu Name

Linkages - Solicitor Totals

Description

Designed to be used with a Linkage-based Selection Result of solicitor linkages (normal coded as "SOLTOR" in the linkage code), this report layout will show total revenue and total promised (pledged) revenue by donor for each solicitor. Note that while there is a dedicated Solicitor field in each constituent's main (header) record which is sufficient for most organizations, the linkages facility in DonorQuest offers a more advanced of constituent solicitation in which each constituent may have multiple solicitors for different purposes.

02/16/2018 **Linkages - Solicitor Totals** Page 1

Solicitor Linkages

Solicitee Name	Don Date	Amount	Stimulus	Pldg Start	Pldg Amount	Paid	Comment
*** FOR SOLICITOR: Anderson; Brad							
Musk, Elon	01/15/2018	1,000.00	SE	02/01/2018	50,000.00	0.00	Funding Migration from Windows
	01/10/2018	5,000.00	18AC	02/01/2018	6,000.00	0.00	Funding Electric Vehicles
	12/15/2017	1,000.00	SE	02/01/2018	24,000.00	0.00	Automating our warehouse
	12/15/2017	10,000.00	ACC	02/01/2018	6,000.00	0.00	Support for music education
	11/15/2017	1,000.00	SE	10/01/2017	12,000.00	4,000.00	Support for science education
	10/15/2017	1,000.00	SE				
	03/10/2017	7,000.00	17AC				
	12/10/2016	6,500.00	ACC		98,000.00	4,000.00	
	03/29/2016	6,000.00	16AC				
	12/08/2015	5,000.00	ACC				
	03/15/2015	4,500.00	15AC				
		48,000.00					
*** FOR SOLICITOR: Knight; Paula							
Harrison, George	10/01/2017	500.00	SE				
	11/20/2016	14,000.00	16AC				
	11/03/2016	24,000.00	16AC				
	11/02/2016	45,000.00	16AC				
	11/01/2016	25,000.00	16AC				
	10/01/2015	70,000.00	15AC				
	09/01/2014	50,000.00	14AC				
	08/01/2012	40,000.00	12AC				
	07/01/2011	30,000.00	11AC				
	06/01/2010	20,000.00	10AC				
	06/12/2009	500.00	09AC				
	05/01/2008	15,000.00	08AC				
	04/01/2006	10,000.00	06AC				
		344,000.00			0.00	0.00	
		392,000.00			98,000.00	4,000.00	

Report Menu Name

Linkages - Solicitor Totals - Donations And Pledges For The Past 730 Days

Description

This is a variation on the, "Linkages - Solicitor Totals" report which has the same layout but limits donations and pledges shown to just those from the past 730 days from the date the report is run.

02/16/2018 **Solicitor Totals - Donations And Pledges For The Past 730 Days** Page 1

Solicitor Linkages

Solicitee Name	Don Date	Don Amount	Stimulus	Pldg Start	Pldg Amount	Paid	Pldg Comment
*** FOR SOLICITOR: Anderson; Brad							
Musk, Elon	01/15/2018	1,000.00	SE	02/01/2018	50,000.00	0.00	Funding Migration from Windows
	01/10/2018	5,000.00	18AC	02/01/2018	6,000.00	0.00	Funding Electric Vehicles
	12/15/2017	1,000.00	SE	02/01/2018	24,000.00	0.00	Automating our warehouse
	12/15/2017	10,000.00	ACC	02/01/2018	6,000.00	0.00	Support for music education
	11/15/2017	1,000.00	SE	10/01/2017	12,000.00	4,000.00	Support for science education
	10/15/2017	1,000.00	SE				
	03/10/2017	7,000.00	17AC				
	12/10/2016	6,500.00	ACC		98,000.00	4,000.00	
	03/29/2016	6,000.00	16AC				
		38,500.00					
*** FOR SOLICITOR: Knight; Paula							
Harrison, George	10/01/2017	500.00	SE				
	11/20/2016	14,000.00	16AC				
	11/03/2016	24,000.00	16AC				
	11/02/2016	45,000.00	16AC				
	11/01/2016	25,000.00	16AC				
		108,500.00			0.00	0.00	
		147,000.00			98,000.00	4,000.00	

Report Menu Name

Linkages - Solicitor Totals - Donations For The Past 730 Days

Description

This is a variation on the, "Linkages - Solicitor Totals - Donations And Pledges For The Past 730 Days" report which only shows donation history for the past 730 days.

02/16/2018 | **Solicitor Totals - Donations For The Past 730 Days** | Page 1

Solicitor Linkages

Solicitee Name	Donation Date	Donation Amount	Donation Stimulus	Donation Comment
*** FOR SOLICITOR: Anderson; Brad				
Musk, Elon	01/15/2018	1,000.00	SE	
	01/10/2018	5,000.00	18AC	
	12/15/2017	1,000.00	SE	
	12/15/2017	10,000.00	ACC	
	11/15/2017	1,000.00	SE	
	10/15/2017	1,000.00	SE	
	03/10/2017	7,000.00	17AC	
	12/10/2016	6,500.00	ACC	
	03/29/2016	6,000.00	16AC	
		38,500.00		
		38,500.00		
*** FOR SOLICITOR: Knight; Paula				
Harrison, George	10/01/2017	500.00	SE	
	11/20/2016	14,000.00	16AC	Sample Donation
	11/03/2016	24,000.00	16AC	Sample Donation
	11/02/2016	45,000.00	16AC	Sample Donation
	11/01/2016	25,000.00	16AC	Sample Donation
		108,500.00		
		147,000.00		

8.7 Sample Contact Reports

Report Menu Name

Contacts - By Year And Month

Description

Designed to be used with a Contact-based Selection Result, this report layout will group contacts by year, and then by month within each year, based on the next contact date.

02/16/2018 | Contacts - By Year And Month | Page 3

All Contacts

ID	Name / Telephone	Description	Next / Last	Action	Status	Notes
Year: 2012						
Month: 1						
12	Justin Hayward Threshold Records H: (425) 555-1212 W: (206) 555-1212 1234	Follow up call	01/14/2012 01/07/2012	Call Back	Closed	Justin offered to volunteer in future events. Follow up with him.
Year: 2014						
Month: 1						
20	James Burke H: (415) 555-1212 W:	Call For Pledge Follow-up	01/28/2014 01/14/2014	Call Back	Open	James said he would be in a better position to make a pledge in a coupl weeks, so I should call him back then.
Month: 8						
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Moves Management	08/17/2014 08/10/2014	Strategy Drafted	Closed	Prospect seemed very open to helping with our mission in general. They might be in a posiiton to give us a rather large gift -- possibly a grant -- sometime in the near future -- maybe in a year or so.

Report Menu Name

Contacts - By Year And Month, Subgrouped By Action

Description

Designed to be used with a Contact-based Selection Result, this report layout will group contact action items and associated constituents by contact year and month.

02/16/2018 Contacts - By Year And Month, Subgrouped By Action Page 4
All Contacts

ID	Name / Telephone	Description	Next / Last	Action / Status	Notes	Count
- March, 2017						
Action: CB						
10	Roger Waters H: (808) 555-1212 W:	Offer Concert Tickets	03/23/2017 03/16/2017	Call Back Open		
24	Timothy Harrison IBM Corporation H: W: (510) 432-1322	Spring Campaign Call	03/23/2017 03/16/2017	Call Back Closed		
27	James Burke The Corporation For Public Broadcasting H: ( ) - W: (415) 555-1234	GRANT	03/29/2017 01/12/2017	Call Back Open	Amount he said may be possible: 25,000.00 Very promising, need to stay on top of this!	
29	George Harrison Northern Songs Limited, (U.S. Division) H: W: (510) 213-2132	GRANT	03/01/2017 02/01/2017	Call Back Open	Amount: $3,500.00 Very good grant prospect. Be sure and call them back when DonorQuest reminds me to!	
						------------- 4
Action: EMAIL						
3	James Kirk Trek Foundation H: (510) 674-3283 W:	Pledge Solicitation	03/23/2017 03/16/2017	Send Contact An Email Closed	9/10/2017: Called donor today. He said he might be willing to make a $300.00 pledge in about a month, and that I should call him again in early October. 10/11/2017: Called donor. He committed to a $300.00	

Report Menu Name

Contacts - Grant Detail Report - All Grants By User

Description

Designed to be run directly or used with a Contact-based Selection Result, this report layout will show all grant-coded contacts by the DonorQuest user account to which they are assigned. If run directly (outside of a selection result) this report will automatically show grant contacts, as given by the grant amount requested being greater than zero.

02/16/2018 Contacts - Grant Detail Report - All Grants By User Page 3

Grant Contacts

Name / Telephone	G Type	Description	Req. / Ack.	Decided	Status	Amount Req	Granted	Paid To Date	Notes
** Grant Contacts For: Paul									
James Burke The Corporation For Public Broadcasting H: ( ) - W: (415) 555-1234	CORP	GRANT	01/04/2017 01/11/2017		APPROV	$45,000.00	$45,000.00	0.00	Amount he said may be possible: 25,000.00 Very promising, need to stay on top of this!
Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	FOUND	Grant Request	03/15/2017 03/20/2017		PENDING	$80,000.00	$0.00	0.00	
						$125,000.00	$45,000.00	0.00	
						$270,000.00	$95,000.00	0.00	

Report Menu Name

Contacts - Grant Detail Report - All Grants By User, Open Grants Only

Description

Designed to be run directly or used with a Contact-based Selection Result, this report layout will show all grant-coded contacts by the DonorQuest user account to which they are assigned. If run directly (outside of a selection result) this report will automatically show only grant contacts which are still open.

02/16/2018 Contacts - Grant Detail Report - All Grants By User, Open Grants Only Page 2

Scheduled Contacts for Grants Which Are Still Open

Name / Telephone	G Type	Description	Req. / Ack.	Decided	Status	Amount Req	Granted	Paid To Date	Notes
** Grant Contacts For: Paul									
Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	FOUND	Grant Request	03/15/2017 03/20/2017		PENDING	$80,000.00	$0.00	0.00	
						$80,000.00	$0.00	0.00	
						$160,000.00	$0.00	0.00	

Report Menu Name

Contacts - Grant Payment Report - Approved Grants Not Yet Paid Off

Description

Designed to be run directly, this report layout will show all grant-coded contacts for grants which have been approved, but not yet fully funded. Normally this report is run directly (outside of a selection result) and it will automatically select grant contacts for which the grant amount requested is greater than zero, the grant status is set to "APPROVED", and the grant amount requested is greater than the amount paid to date.

02/16/2018 **Contacts - Grant Payment Report - Approved Grants Not Yet Paid Off** **Page 1**

Scheduled Contacts - Grants Approved But Not Yet Paid Off

Name / Telephone	G Type	Description	Req. / Ack.	Decided	Status	Amount Req	Granted	Paid To Date	Notes
Peter Davidson Decca Records H: (415) 555-1212 W:	FOUND	Grant Request	01/02/2017 01/05/2017		APPROV	$5,000.00	$0.00	$0.00	12/15/16: Ran into Peter at a local PTA meeting. He said we would be good candidates to receive a grant and that I should give him a call after New Year's. 01/02/17: Call back on February 15th to confirm grant approval. 02/15/17: Spoke with Peter, we got the grant! Should give him a call again in a month to thank him and let him know what a huge difference the money made to our organization.
James Burke The Corporation For Public Broadcasting H: ( ) - W: (415) 555-1234	CORP	GRANT	01/04/2017 01/11/2017		APPROV	$45,000.00	$25,000.00	$20,000.00	Amount he said may be possible: 25,000.00 Very promising, need to stay on top of this!
Justin Hayward Threshold Records H: (425) 555-1212 W: (206) 555-1212 1234	FOUND	Grant Request	02/08/2017 02/10/2017		APPROV	$65,000.00	$50,000.00	$0.00	Justin is our contact there. Go over our Grant Request with him to ensure everything is in order.
						$115,000.00	$75,000.00	$20,000.00	

Report Menu Name

Contacts - Tickler Report By User

Description

Designed to be used with a Contact-based Selection Result, this report layout will show contact detail by the DonorQuest user account to which each contact is assigned. The constituent's full name, address, and contact telephone numbers are shown. This report layout is typically used with a selection result which narrows the contacts down to those you wish to see for each user. For example, you might select contacts with next action dates coming up in the next week or month.

02/16/2018 **Contacts - Tickler Report By User** **Page 5**

Universal Qualification

ID	Name / Telephone	Description	Next / Last	Action	Status	Notes
** Contacts For: Paul						
24	Timothy Harrison IBM Corporation H: W: (510) 432-1322	Fall Campaign Call	03/23/2017 03/16/2017	Send Contact An Email	Closed	
27	James Burke The Corporation For Public Broadcasting H: ( ) - W: (415) 555-1234	GRANT	03/29/2017 01/12/2017	Call Back	Closed	Amount he said may be possible: 25,000.00 Very promising, need to stay on top of this!
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Grant Request	04/15/2017 03/15/2017	Grant Request	Open	
3	James Kirk Trek Foundation H: (510) 674-3283 W: (510) 270-1050	Pledge Solicitation	04/23/2017 04/16/2017	Send Contact An Email	Open	9/10/2017: Called donor today. He said he might be willing to make a $300.00 pledge in about a month, and that I should call him again in early October. 10/11/2017: Called donor. He committed to a $300.00 pledge, and said he will be sending in an initial payment of $50.00 this week.
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Calling to invite Brad to our major donor thank-you dinner.	02/23/2018 02/15/2018	Call Back	Open	02/15/2018: Called Brad but got his voicemail. Before transferring me the receptionist said this is a very busy week for him, but that things will be slowing down a lot next week. I left a message inviting him to our major donor thank-you dinner next Friday. I said that I understand he is very busy but we would love to have him and I'll check in one more time with him next week to see how things are going. I think it would be best to try him one more time on the 23rd, just a couple days before our dinner, so I will set my next contact date to the 23rd so DonorQuest will remind me when I come in that morning to give Brad another call.

Report Menu Name

Contacts - Tickler Report By User, Open Contacts Only

Description

Designed to be run directly or used with a Contact-based Selection Result, this report layout will show only open contacts by username.

02/16/2018 | Contacts - Tickler Report By User, Open Contacts Only | Page 2

Contacts Which Are Still Open

ID	Name / Telephone	Description	Next / Last	Action	Status	Notes
** Contacts For: Paul						
3	James Kirk Trek Foundation H: (510) 674-3283 W: (510) 270-1050	Pledge Solicitation	03/23/2017 03/16/2017	Send Contact An Email	Open	9/10/2017: Called donor today. He said he might be willing to make a $300.00 pledge in about a month, and that I should call him again in early October. 10/11/2017: Called donor. He committed to a $300.00 pledge, and said he will be sending in an initial payment of $50.00 this week.
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Grant Request	04/15/2017 03/15/2017	Grant Request	Open	
32	Brad Anderson Intrepid Systems Inc. H: (800) 555-1212 W: (800) 952-8228	Calling to invite Brad to our major donor thank-you dinner.	02/23/2018 02/15/2018	Call Back	Open	02/15/2018: Called Brad but got his voicemail. Before transferring me the receptionist said this is a very busy week for him, but that things will be slowing down a lot next week. I left a message inviting him to our major donor thank-you dinner next Friday. I said that I understand he is very busy but we would love to have him and I'll check in one more time with him next week to see how things are going. I think it would be best to try him one more time on the 23rd, just a couple days before our dinner, so I will set my next contact date to the 23rd so DonorQuest will remind me when I come in that morning to give Brad another call.

Report Menu Name

Contacts - User Counts

Description

Designed to be run directly or used with a Contact-based Selection Result, this report layout will count the number of contacts each user has assigned to them.

02/16/2018 **Contacts - User Counts** **Page 1**

Universal Qualification

User	Count
Gabe	2
Guest	2
Patrick	8
Paul	5
Robert	2
	19

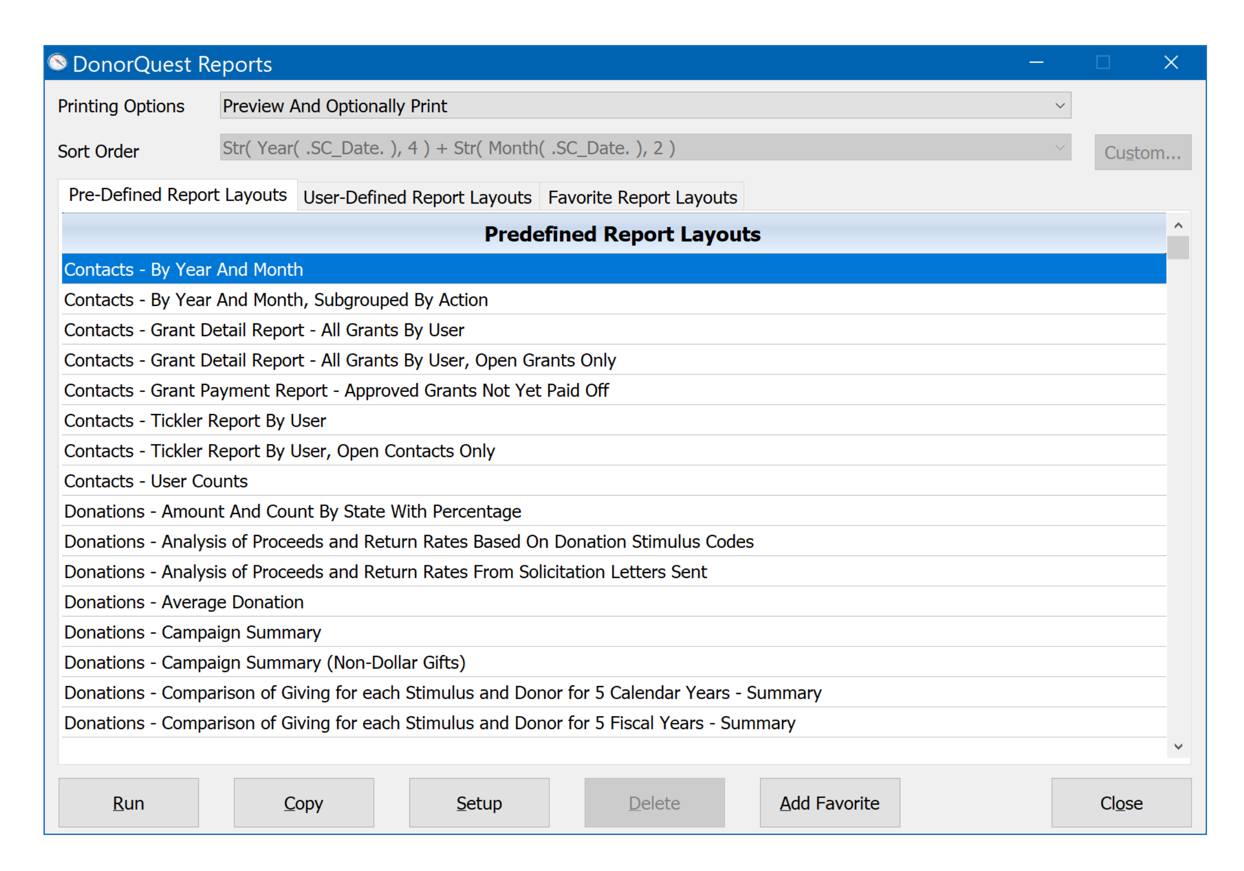
8.8 Standard Report List

The term Report in DonorQuest refers to the page layout -- the arrangement of data on a printed page. Reports control which attributes of a donor account will be shown and where they will be positioned on the page. Selections filter data, reports show data. While some reports may do minor additional filtering if they are specially designed to do so, the major filtering tasks are always accomplished by selections. For example, if you select donors in a specific zip code range, the selection defines which donors will print, and the report layout you choose will control what about each donor will appear on the page -- maybe just the names, maybe the names and addresses, maybe the names and phone numbers, etc.

This topic provides a comprehensive listing of all the report layouts included with DonorQuest. Although you are not allowed to make changes to these reports directly, you may copy any report to make your own modifications.

Notice how the name of each report begins with the name of the table for which the report is to be used with. All reports are designed to be run from a particular table, for example the Campaign Summary report is intended to be run from the Donations table because that is where this information is gathered from. Therefore, the Campaign report is named, "Donations - Campaign Summary", denoting that the report needs to be run from the Donations table, or a Donation-based selection. This naming convention also helps group all of the usable reports together for printing from a selection that you have created. For example if you are printing from a donation-based selection, only the report layouts designed to print from the donation table will be offered in the report menu. You should maintain this report naming convention in any custom report layouts you create.

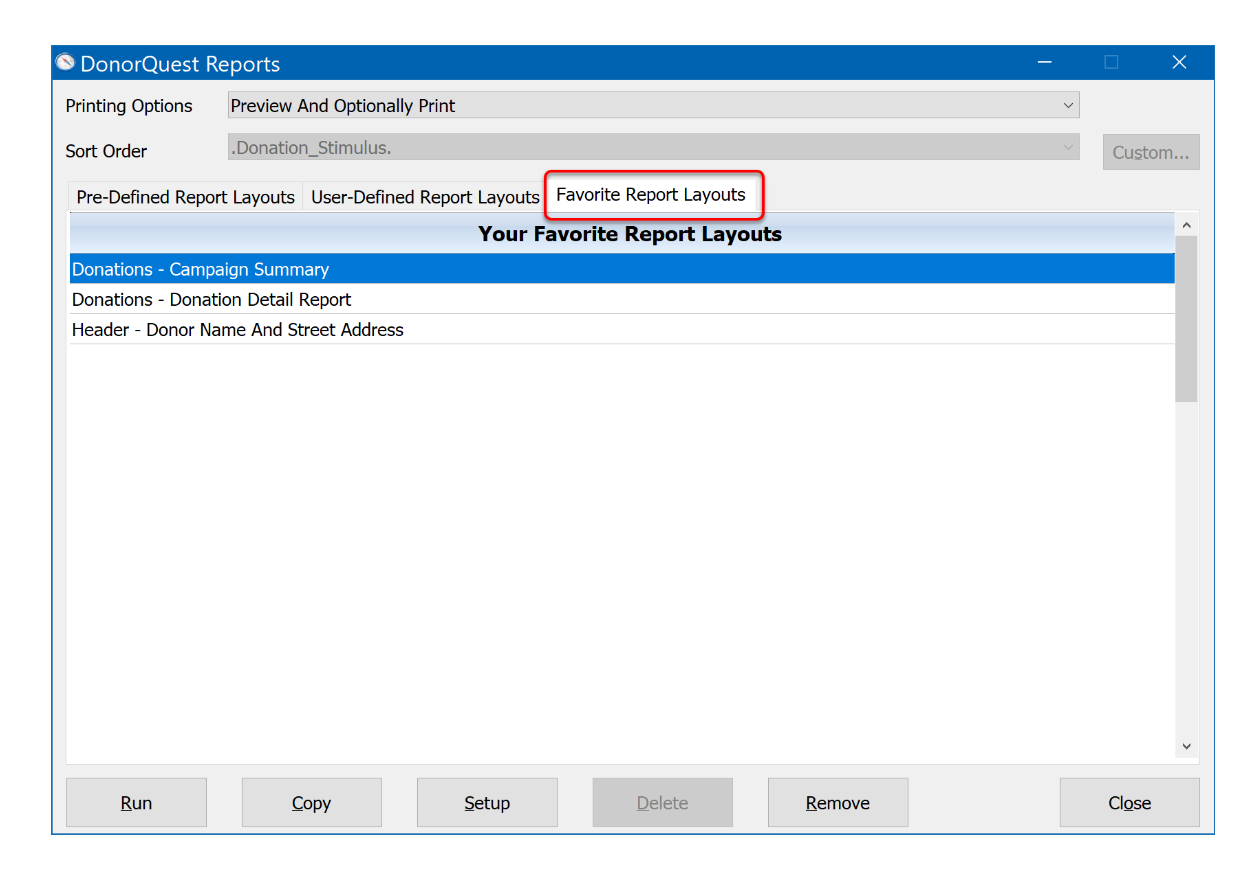
To see what any of these reports look like, you can simply preview them in DonorQuest. This is done by starting with all DonorQuest windows closed, then clicking on the Print button of the DonorQuest toolbar. Since this gives you direct access to your entire database, all reports are shown since you are not limiting the records by using a specific selection result. Be sure and set the Printing Options to Preview And Optionally Print, like this:



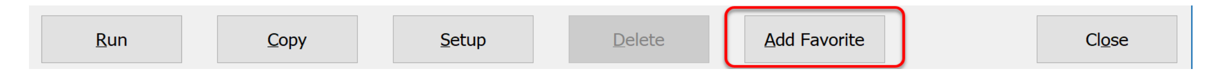
For an example of limiting the information printed by a report by associating it with a selection result, please refer to the Reports topic of the Quick Start topic. You should also see Printing Reports under the Working With Selection Results topic.

Remembering Your Favorite Reports

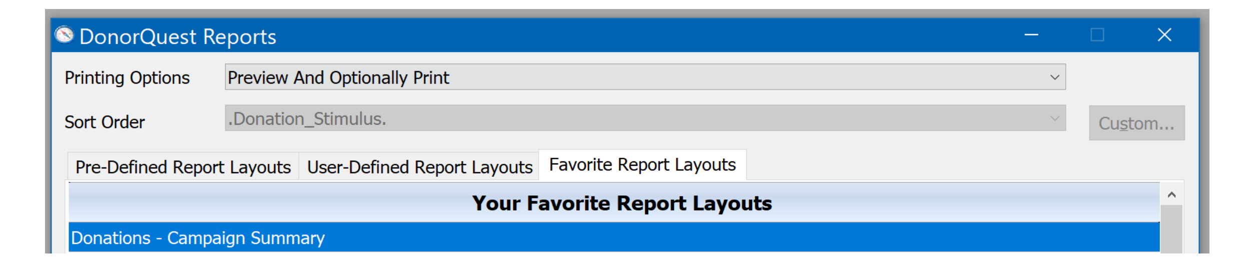
DonorQuest allows you to maintain a personalized list of the reports you use most often, so that you can get to them quickly. The list is user-specific, so your report preferences will not interfere with those of other users. When the DonorQuest Report menu is open, you will see a new, "Favorite Report Layouts" tab, as shown here:



There is also a new, "Add Favorite" button at the bottom of the DonorQuest Reports dialog which will copy the currently highlighted report to your personal Favorite Report Layouts tab:



For example, clicking on the Add Favorites button when the, "Donations - Campaign Summary" report is highlighted on the Pre-Defined Report Layouts tab will add this report to your personal favorites tab like this:



Here is a comprehensive list of all the report layouts provided with DonorQuest:

Contacts - By Year And Month
Contacts - By Year And Month, Subgrouped By Action
Contacts - Grant Detail Report - All Grants By User
Contacts - Grant Detail Report - All Grants By User, Open Grants Only
Contacts - Grant Payment Report - Approved Grants Not Yet Paid Off

Contacts - Tickler Report By User
Contacts - Tickler Report By User, Open Contacts Only
Contacts - User Counts
Donations - Amount And Count By State With Percentage
Donations - Analysis of Proceeds and Return Rates Based On Donation Stimulus Codes
Donations - Analysis of Proceeds and Return Rates From Solicitation Letters Sent
Donations - Campaign Summary
Donations - Campaign Summary (Non-Dollar Gifts)
Donations - Comparison Of Year-To-Year Giving By Calendar Year
Donations - Comparison Of Year-To-Year Giving By Fiscal Year
Donations - Comparison Of Year-To-Year Giving By Fiscal Year With Totals
Donations - Comparison of Giving for each Stimulus and Donor for 5 Calendar Years - Summary
Donations - Comparison of Giving for each Stimulus and Donor for 5 Fiscal Years - Summary
Donations - Comparison of Giving for each Stimulus for 5 Calendar Years - Summary
Donations - Comparison of Giving for each Stimulus for 5 Fiscal Years - Summary
Donations - Count And Total Of Donations By 5-digit Zip With Percentages
Donations - Count And Total Of Donations By County With Percentages
Donations - Count And Total Of Donations By Donor Type With Percentages
Donations - Count And Total Of Donations By Giving Entity With Percentages
Donations - Count And Total Of Donations By Zip With Percentages
Donations - Count Of Gifts In Dollar Ranges By Calendar Year
Donations - Count Of Gifts In Dollar Ranges By Calendar Year And Week
Donations - Count Of Gifts In Dollar Ranges By Fiscal Year
Donations - Count Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year
Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year And Week
Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year
Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Donation Detail Report
Donations - Donation Detail Report - Ordered By Donation Date
Donations - Donation Detail Report - Totals Only
Donations - Donation Detail Report For Soft Credit Monetary Donations Only
Donations - Donation Detail Report Including Alternate Unit Donations
Donations - Donation Detail Report Including Alternate Unit Donations - Totals Only
Donations - Donation Detail Report With Addresses
Donations - Donation Detail Report With Addresses - Totals Only
Donations - Donation Detail Report With Addresses Including Alternate Unit Donations
Donations - Donation Detail Report With Addresses Including Alternate Unit Donations - Totals Only
Donations - Donation Detail Report With Totals And Counts By Donor
Donations - Donation Detail Report, Subtotals by Calendar Year
Donations - Donation Summary Report
Donations - Donor Name, Phone, Donation Amount And Stimulus
Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Current Cal Year's Total
Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Prev Cal Year's Total Giving
Donations - Donor Report (Ranked) w/ Contact Info & Donation Totals
Donations - For Mail Merge With Selected Donations Totalled By Donor (example for file/ Excel output)
Donations - Grouped And Totaled By Month/Year, Subgrouped And Totaled By Stimulus
Donations - Grouped By 5-Digit Zip Code

Donations - Grouped By 5-Digit Zip Code - Summary
Donations - Grouped By Account
Donations - Grouped By Account - Summary
Donations - Grouped By Account, Ordered By Constituent Name Within Account
Donations - Grouped By Account, Subtotaled By Month And Year
Donations - Grouped By Account, Subtotalled by Fund
Donations - Grouped By Account, Subtotalled by Fund, Totals Only
Donations - Grouped By Account, Subtotalled by Stimulus
Donations - Grouped By Account, Subtotalled by Stimulus, Totals Only
Donations - Grouped By Appeal
Donations - Grouped By Appeal - Summary
Donations - Grouped By Appeal - Summary - Current And Past 2 Fiscal Years Only
Donations - Grouped By Calendar Year
Donations - Grouped By Calendar Year - Summary
Donations - Grouped By County
Donations - Grouped By County - Summary
Donations - Grouped By Date
Donations - Grouped By Date - Summary
Donations - Grouped By Day/Month/Year
Donations - Grouped By Day/Month/Year - Summary
Donations - Grouped By Donation Amounts, With Counts
Donations - Grouped By Donation Type
Donations - Grouped By Donation Type - Summary
Donations - Grouped By Donation Type, Subordered By Giving Entity
Donations - Grouped By Donor And Fund - Summary
Donations - Grouped By Donor Name With Address, Donation Totals, Counts, And Averages
Donations - Grouped By Donor Name With Calendar Year Totals And Counts
Donations - Grouped By Donor Name With Donation Totals, Counts, And Averages
Donations - Grouped By Donor Name With Fiscal Year Totals And Counts
Donations - Grouped By Donor Type
Donations - Grouped By Donor Type - Summary
Donations - Grouped By Donor Type With Calendar Year Totals And Counts
Donations - Grouped By Donor Type With Fiscal Year Totals And Counts
Donations - Grouped By Donor Type, Subtotaled by Donation Type
Donations - Grouped By Fiscal Year
Donations - Grouped By Fiscal Year + Appeal - Summary
Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code
Donations - Grouped By Fiscal Year + Stimulus, Subgrouped by TY code, Summary
Donations - Grouped By Fiscal Year - Alternate Unit Donations - Summary
Donations - Grouped By Fiscal Year - Summary
Donations - Grouped By Fiscal Year and Stimulus
Donations - Grouped By Fund
Donations - Grouped By Fund - 1st Quarter Current and Previous 2 Years - Summary
Donations - Grouped By Fund - 2nd Quarter Current and Previous 2 Years - Summary
Donations - Grouped By Fund - 3rd Quarter Current and Previous 2 Years - Summary
Donations - Grouped By Fund - 4th Quarter Current and Previous 2 Years - Summary
Donations - Grouped By Fund - Summary
Donations - Grouped By Fund - Summary With Donation And Donor Counts
Donations - Grouped By Fund Code Description
Donations - Grouped By Giver, Showing Soft Credit Recipient (If Any)
Donations - Grouped By Month, Subgrouped By Stimulus
Donations - Grouped By Month/Year
Donations - Grouped By Month/Year & Donor Type - Summary

Donations - Grouped By Month/Year - Summary
Donations - Grouped By Organization Name And Account
Donations - Grouped By State
Donations - Grouped By State - Summary
Donations - Grouped By Stimulus
Donations - Grouped By Stimulus - Code Description
Donations - Grouped By Stimulus - Summary
Donations - Grouped By Stimulus - Summary With Averages
Donations - Grouped By Stimulus And Donor - Summary
Donations - Grouped By Stimulus And Donor - Summary (for file output only)
Donations - Grouped By Stimulus With Monthly Totals In Columns
Donations - Grouped By Stimulus, Subgrouped By Appeal
Donations - Grouped By Stimulus, Subgrouped By Appeal - Code Descriptions
Donations - Grouped By Stimulus, Subgrouped By Appeal - Code Descriptions - Summary
Donations - Grouped By Stimulus, Subgrouped By Appeal - Summary
Donations - Grouped By Stimulus, Subgrouped By Donation Type
Donations - Grouped By Stimulus, Subgrouped By Donor Name
Donations - Grouped By Stimulus, Subsorted By Amount
Donations - Grouped By Stimulus, Subsorted By Donor Name
Donations - Grouped By TY Code
Donations - Grouped By TY Code- Summary
Donations - Grouped By Year + Stimulus, Subgrouped by TY code
Donations - Grouped By Year + Stimulus, Subgrouped by TY code - Summary
Donations - Grouped By Year With Donor Name, Amount, Stimulus
Donations - Grouped By Year and Stimulus
Donations - Grouped By Zip Code
Donations - Grouped By Zip Code - Summary
Donations - Number of DONORS Giving To Each Campaign
Donations - Pledge Payments For Calendar Year, 1 Year Ago
Donations - Pledge Payments For Previous Month
Donations - Previous Month Only
Donations - Previous Year Only
Donations - Quarterly Giving Totals By Calendar Year
Donations - Quarterly Giving Totals By Fiscal Year
Donations - Recency / Frequency Report, 0-3 Month Donors
Donations - Recency / Frequency Report, 13-18 Month Donors
Donations - Recency / Frequency Report, 19-24 Month Donors
Donations - Recency / Frequency Report, 25-36 Month Donors
Donations - Recency / Frequency Report, 36-plus Month Donors
Donations - Recency / Frequency Report, 4-6 Month Donors
Donations - Recency / Frequency Report, 7-12 Month Donors
Donations - Recency / Frequency Report, Overall Totals
Donations - Soft Credit Donations Only, Grouped By Giver
Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient
Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Subsorted By Giver
Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Totals Only
Donations - Total Of Gifts In Dollar Ranges By Calendar Year
Donations - Total Of Gifts In Dollar Ranges By Calendar Year And Week
Donations - Total Of Gifts In Dollar Ranges By Fiscal Year
Donations - Total Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Totals And Year Counts
Donations - Totals And Year Counts, With Address, First, And Most Recent Years

Donations - Totals, Counts, Averages By City And Year
Donations - Volunteer Hours For Soft Credit Recipient, Totals Only
Donations - Yearly Donation Counts By $50 Increments
Donations - Yearly Donation Counts By $50 Increments (Fiscal Years)
Donations - Yearly Donation Totals By $50 Increments
Donations - Yearly Donation Totals By $50 Increments (Fiscal Years)
Extra Address - Basic Fields
Extra Address - Basic Fields, Grouped By Extra Address Code
Extra Address - Basic Fields, Grouped By Zip Code
Extra Address - Zip Code Counts
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard & Soft Totals, No HONOR/MEMOR
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard And Soft Totals
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With # of Donors and Donor Totals
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, With Donor Totals
Header - 3-Year Comparison Of Year-To-Year Calendar Year TY Amounts, With Totals
Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard & Soft Totals, No HONOR/MEMOR
Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard And Soft Totals
Header - All Donors, Donation Totals Since 01/01/2017 In Descending Order
Header - All Donors, Lifetime Donation AND Outstanding Pledge Totals In Descending Order
Header - All Donors, Lifetime Donation Totals In Descending Order
Header - Birthdays By Month
Header - Calendar Year Totals And Donation Counts For Previous Two Years
Header - Calendar Year Totals And Donor Counts For Previous Two Years
Header - City Counts With Donation Totals
Header - City Groupings
Header - Comparison Of Hard And Soft Year-To-Year Giving By Calendar Year
Header - Comparison Of Hard And Soft Year-To-Year Giving By Fiscal Year
Header - Comparison Of Month-To-Month Giving, Calendar Year 1 Year Ago
Header - Comparison Of Month-To-Month Giving, Calendar Year 2 Years Ago
Header - Comparison Of Month-To-Month Giving, Calendar Year 3 Years Ago
Header - Comparison Of Month-To-Month Giving, Current Calendar Year
Header - Comparison Of Month-To-Month Giving, Current Calendar Year With Donor ID
Header - Comparison Of Month-To-Month Giving, Current Fiscal Year
Header - Comparison Of Month-To-Month Giving, Fiscal Year 1 Year Ago
Header - Comparison Of Month-To-Month Giving, Fiscal Year 2 Years Ago
Header - Comparison Of Month-To-Month Giving, Fiscal Year 3 Years Ago
Header - Comparison Of Total Giving In 365-Day Periods Starting From Today Going Back
Header - Comparison Of Year-To-Date Giving By Calendar Year
Header - Comparison Of Year-To-Month Giving By Calendar Year
Header - Comparison Of Year-To-Year Giving By Calendar Year
Header - Comparison Of Year-To-Year Giving By Calendar Year (10 Years)
Header - Comparison Of Year-To-Year Giving By Calendar Year, Volunteer Hours Only
Header - Comparison Of Year-To-Year Giving By Fiscal Year
Header - Complete Information On Each Donor
Header - Complete Information On Each Donor With Soft Credit Donations
Header - Constituent Name With Stored File List And Count
Header - Contact Listing
Header - Count Of Counties And States With Percentages
Header - Count Of Counties With Percentages
Header - Count Of Donor Types

Header - Count Of Donor Types With Percentages
Header - Count Of States With Percentages
Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease With Detail
Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease, With Counts
Header - Current And Previous Calendar Year Donations, Sorted By Zip With Detail
Header - Current And Previous Fiscal Year Donations, Sorted By Increase/Decrease With Detail
Header - Current And Previous Fiscal Year Donations, Sorted By Increase/Decrease, With Counts
Header - Current And Previous Fiscal Year Donations, Sorted By Zip With Detail
Header - Demographic Report, Individual Donors Only
Header - Donation And Pledge History Combined
Header - Donation And Pledge History Combined, Version 2
Header - Donation History Report, All Donations
Header - Donation History Report, All Donations Including Soft Credit Donations
Header - Donation History Report, All Donations Including Soft Credit Donations, Current/ Past FY
Header - Donation History Report, Hard And Soft Credit Donations For Specific Date Range
Header - Donation History Report, Soft Credit Donations Received Only
Header - Donation History Report, With Address, 2 Most Recent Donations Only
Header - Donation History Report, With Address, No In-kinds
Header - Donation Receipts, All Donations For Current Calendar Year
Header - Donation Receipts, All Donations For Current Calendar Year, Letter Format
Header - Donation Receipts, All Donations For Donor
Header - Donation Receipts, Previous 90 Day's Donations Only
Header - Donation Receipts, Previous 90 Day's Donations Only, Letter Format
Header - Donation Receipts, Previous Month Donations Only
Header - Donation Receipts, Previous Month Donations Only, Letter Format
Header - Donation Receipts, Previous Year Donations Only
Header - Donation Receipts, Previous Year Donations Only, Letter Format
Header - Donor Name And Address And Total Hours (HR) Giving, Counts, Average
Header - Donor Name And Street Address
Header - Donor Name And Street Address For Duplicate Record Check
Header - Donor Name And Street Address Simplified
Header - Donor Name And Street Address With List Codes
Header - Donor Name And Street Address With Most Recent Donation Stimulus
Header - Donor Name, Address, Phone, EMail, Last Gift Info, List Codes
Header - Donor Report (Ranked) w/ Contact Info & Donation Total For A Specific Stimulus
Header - Envelopes (Using First + Last Name)
Header - Envelopes (Using Salutation1 & Extra Address Swapping by Time)
Header - Envelopes (Using Salutation1)
Header - Extra Address Report
Header - First/Latest/Largest
Header - Fiscal Year Totals And Donation Counts For Previous Two Years
Header - Fiscal Year Totals And Donor Counts For Previous Two Years
Header - Giving Increase (Decrease) For Current/Previous Calendar Year
Header - Giving Increase (Decrease) For Current/Previous Calendar Year, Ordered by Increase/Decrease
Header - Giving Increase (Decrease) For Current/Previous Fiscal Year
Header - Giving Increase (Decrease) For Current/Previous Fiscal Year, Ordered by Increase/ Decrease

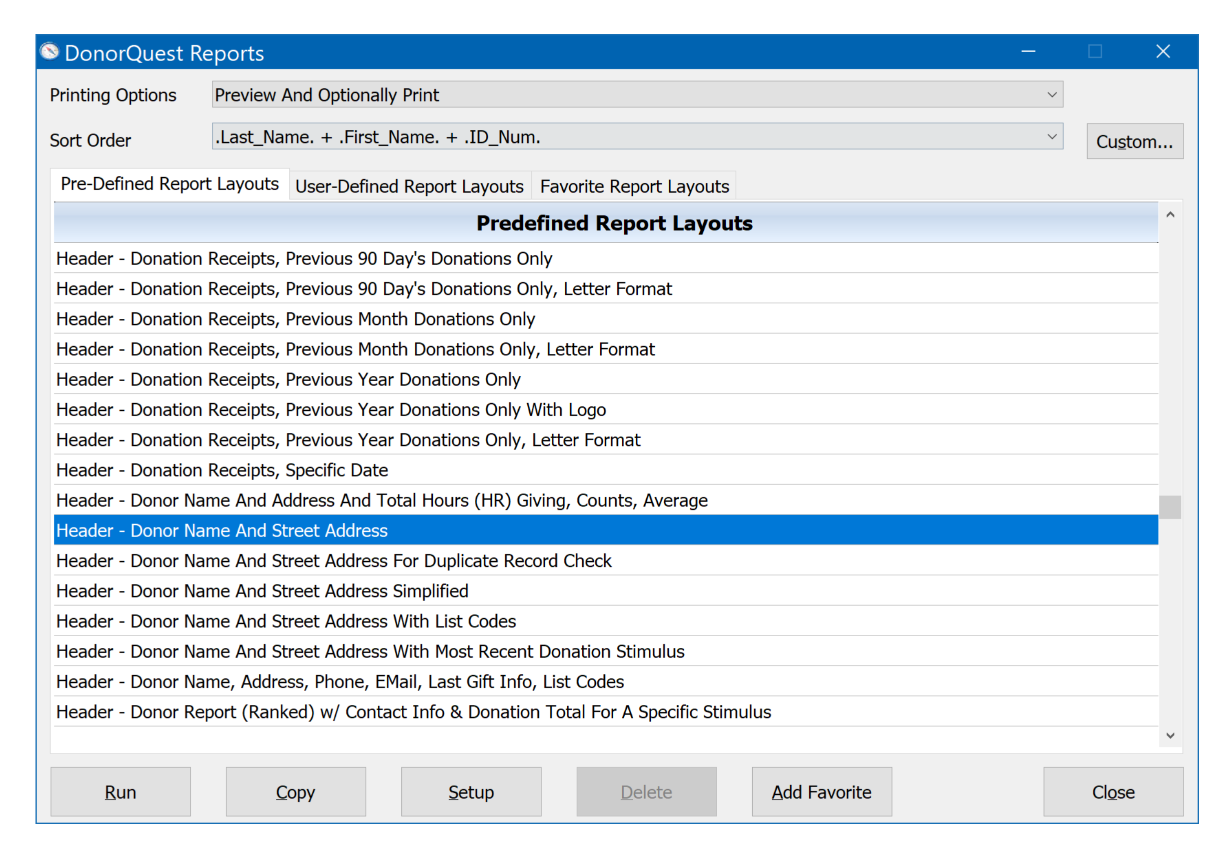
Header - Giving Increase (Decrease) For Previous Two Calendar Years
Header - Giving Increase (Decrease) For Previous Two Fiscal Years
Header - Honor/Memorial Report, All Memorials
Header - Honor/Memorial Report, All Memorials, No Amounts Shown
Header - Honor/Memorial Report, All Memorials, Total Amounts Only
Header - Honor/Memorial Report, All Memorials, Total Amounts Only, Page Eject
Header - Honor/Memorial Report, Specific Time Period
Header - Honor/Memorial Report, Specific Time Period, No Amounts Shown
Header - Honor/Memorial Report, Specific Time Period, Totals Only
Header - Honor/Memorial Report, Specific Time Period, Totals Only, Page Eject
Header - LYBUNT Report
Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail
Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease, With Counts
Header - Last Two Calendar Years Of Donations, Sorted By Zip With Detail
Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease With Detail
Header - Last Two Fiscal Years Of Donations, Sorted By Increase/Decrease, With Counts
Header - Last Two Fiscal Years Of Donations, Sorted By Zip With Detail
Header - Lifetime Donation Totals
Header - Lifetime Donation Totals With Pledges
Header - Lifetime Totals by Donor Type, Including Any Outstanding Pledge Balances
Header - Linked Donor Report, All Linkages For Donor
Header - Memo History Report
Header - New Donor Analysis - First Gift Within Past 365 Days, 2nd Gift Within 60 Days Of 1st
Header - New Donors Y-T-D
Header - New Money Donors, Based On Calendar Year
Header - New Money Donors, Based On Fiscal Year
Header - Notepad Report
Header - Phonathon Sheets
Header - Pledge History Report, All Pledges
Header - Pledge History Report, All Pledges Not Written Off
Header - SYBUNT Report
Header - Scheduled Contact Tickler Report By Donor
Header - Scheduled Contact Tickler Report By Donor - Most Recent Contact Only
Header - Solicitor Report
Header - Solicitor Report With Calendar Totals For Current And Past Three Years
Header - Solicitor Report With Fiscal Totals For Current And Past Three Years
Header - Telephone Report
Header - Telephone Report With Address
Header - Telephone Report With Address And First/Latest/Largest Donation
Header - Top 10 Donor Report
Header - Top 10 Donor Report For Current Calendar Year
Header - Top 10 Donor Report For Current Fiscal Year
Header - Top 10 Donor Report For Previous Calendar Year
Header - Top 10 Donor Report For Previous Fiscal Year
Header - Top 100 Donor Report
Header - Top 100 Donor Report For 2015
Header - Top 100 Donor Report For 2015 to Present
Header - Top 100 Donor Report For Current And Past One Calendar Year
Header - Top 100 Donor Report For Current And Past One Fiscal Year
Header - Top 100 Donor Report For Current And Past Three Calendar Years
Header - Top 100 Donor Report For Current And Past Three Fiscal Years
Header - Top 100 Donor Report For Current And Past Two Calendar Years
Header - Top 100 Donor Report For Current And Past Two Fiscal Years

Header - Top 100 Donor Report For Current Calendar Year
Header - Top 100 Donor Report For Current Fiscal Year
Header - Top 100 Donor Report For November And December Of Last Calendar Year
Header - Top 100 Donor Report For Previous Calendar Year
Header - Top 100 Donor Report For Previous Fiscal Year
Header - Top 1000 Donor Report
Header - Top 200 Donor Report For Past 12 Months
Header - Top 200 Donor Report For Past 18 Months
Header - Top 2000 Donor Report For Past 18 Months
Header - Top 300 Donor Report For Past 60 Months
Header - Top 5000 Donor Report
Header - Volunteer Hours - First & Last - Ordered by Last
Header - Zip Code Counts
Header - Zip Code Counts With Lifetime Donation Totals
Header - Zip Code Counts, Considering First 3 Digits Of Zip Code Only
Linkages - Linked Donor Report
Linkages - Linked Donor Report With Current Calendar Year Totals
Linkages - Solicitor Totals
Linkages - Solicitor Totals - Donations And Pledges For The Past 730 Days
Linkages - Solicitor Totals - Donations For The Past 730 Days
Memos - Grouped By Memo Code
Memos - Grouped By Memo Code - Summary
Memos - Memo Detail Report
Pledge Statements: All Outstanding Pledges
Pledge Statements: All Outstanding Pledges With ALL Payment History
Pledge Statements: All Outstanding Pledges With Payment History
Pledge Statements: Monthly Pledges
Pledge Statements: Monthly Pledges, With Payment History
Pledge Statements: Monthly, Windowed Envelopes
Pledge Statements: Monthly, Windowed Envelopes, With Payment History
Pledge Statements: Quarterly Pledges
Pledge Statements: Quarterly Pledges, With Payment History
Pledge Statements: Quarterly, Windowed Envelopes
Pledge Statements: Quarterly, Windowed Envelopes, With Payment History
Pledge Statements: Semester Pledges
Pledge Statements: Semester Pledges, With Payment History
Pledge Statements: Semester, Windowed Envelopes
Pledge Statements: Semester, Windowed Envelopes, With Payment History
Pledge Statements: Yearly Pledges
Pledge Statements: Yearly Pledges, With Payment History
Pledge Statements: Yearly, Windowed Envelopes
Pledge Statements: Yearly, Windowed Envelopes, With Payment History
Pledge Statements: Yearly, Windowed Envelopes, With Payment History And Payment Stub
Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year
Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year (Summary)
Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year
Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year (Summary)
Pledges - Cash Flow Forecast From Pledges For Next Year
Pledges - Cash Flow Forecast From Pledges For Next Year (Summary)
Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now
Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now (Summary)
Pledges - Cash Flow Forecast From Pledges For The Year, 3 Years From Now
Pledges - Cash Flow Forecast From Pledges For The Year, 3 Years From Now (Summary)

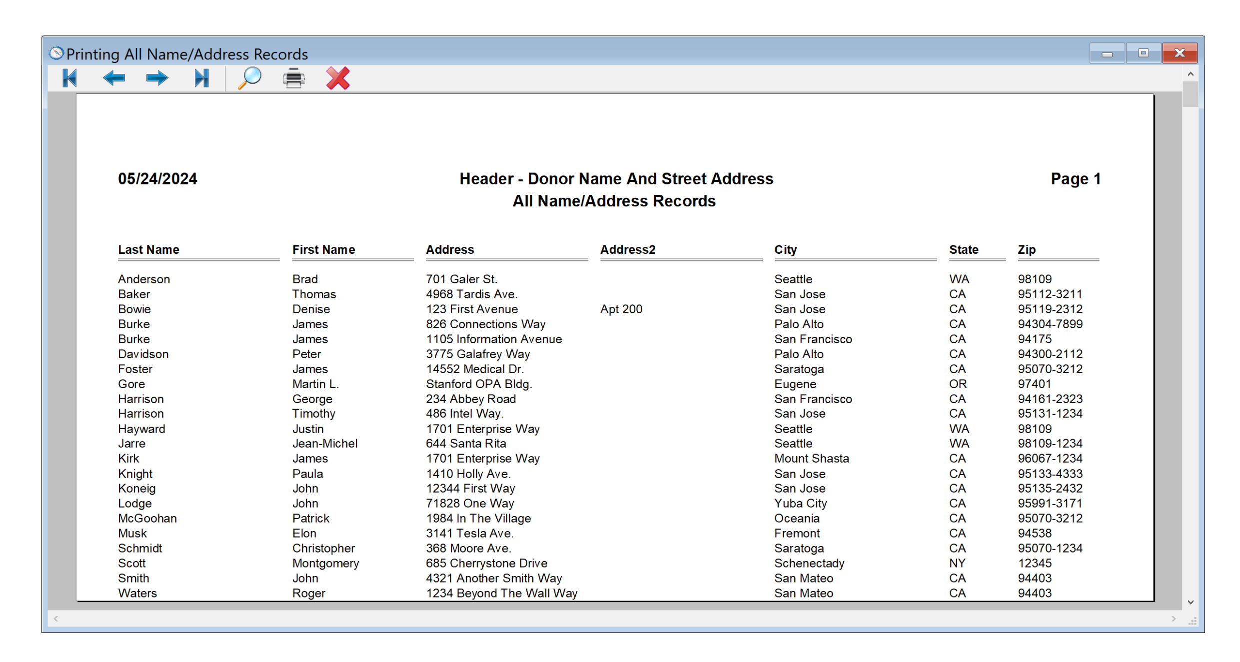
Pledges - Cash Flow Forecast From Pledges For The Year, 4 Years From Now
Pledges - Cash Flow Forecast From Pledges For The Year, 4 Years From Now (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Current Year Jan-Jun
Pledges - Cash Flow Projected/Actual From Pledges Current Year Jan-Jun (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December
Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun
Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December
Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December (Summary)
Pledges - Grouped By Appeal
Pledges - Grouped By Fund
Pledges - Grouped By Payment Frequency
Pledges - Grouped By Payment Frequency - Summary
Pledges - Grouped By Stimulus
Pledges - Grouped By Stimulus - Summary
Pledges - Grouped By Type
Pledges - Grouped By Type - Summary
Pledges - Outstanding Pledges
Pledges - Past Due Pledges Only
Pledges - Pledge Detail Report
Pledges - Pledge Detail Report, No Subtotalling
Pledges - Pledge Payment Report
Pledges - Pledge Payment Report With Payments Due Over Next Six Months
Pledges - Pledge Receivables As They Were On A Specific Date
Pledges - Pledge Receivables At End Of Calendar Year, 1 Year Ago
Pledges - Pledge Receivables At End Of Calendar Year, 2 Years Ago
Pledges - Pledge Receivables At End Of Fiscal Year, 1 Year Ago
Pledges - Pledge Receivables At End Of Fiscal Year, 2 Years Ago
Pledges - Pledge Summary Report By Donor

8.9 Creating and Editing Report Layouts

To create a new report layout, you will need to first find an existing report layout that is somewhat close to what you would like to create, and use that as a starting point. As an example, let's look a basic report layout provided with DonorQuest titled, "Header - Donor Name And Street Address." Starting with all DonorQuest windows closed (so that DonorQuest won't think you want to print a selection or the currently displayed donor record if the Main Information window is open), click on the Print button of the DonorQuest toolbar to open the main report menu, then highlight the "Header - Donor Name And Street Address" report as shown here:



If we run the report in preview mode, we can see that indeed it simply has the donor name and street address, as shown here:

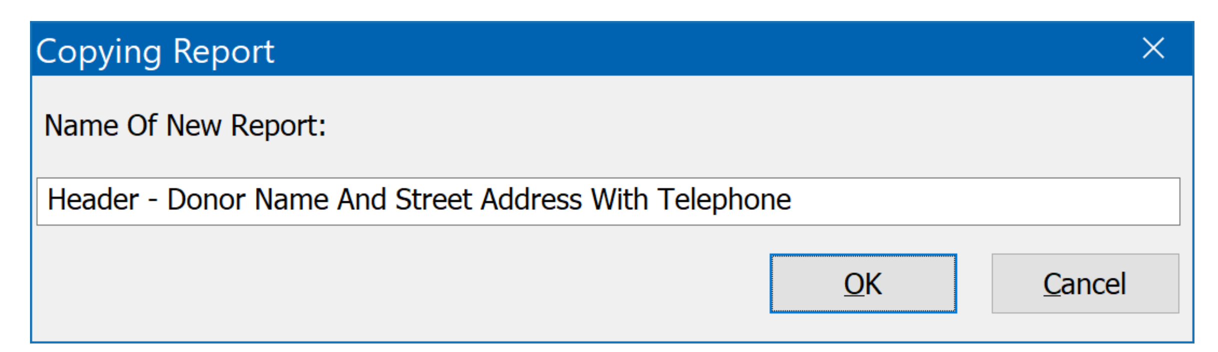


05/24/2024 Header - Donor Name And Street Address Page 1

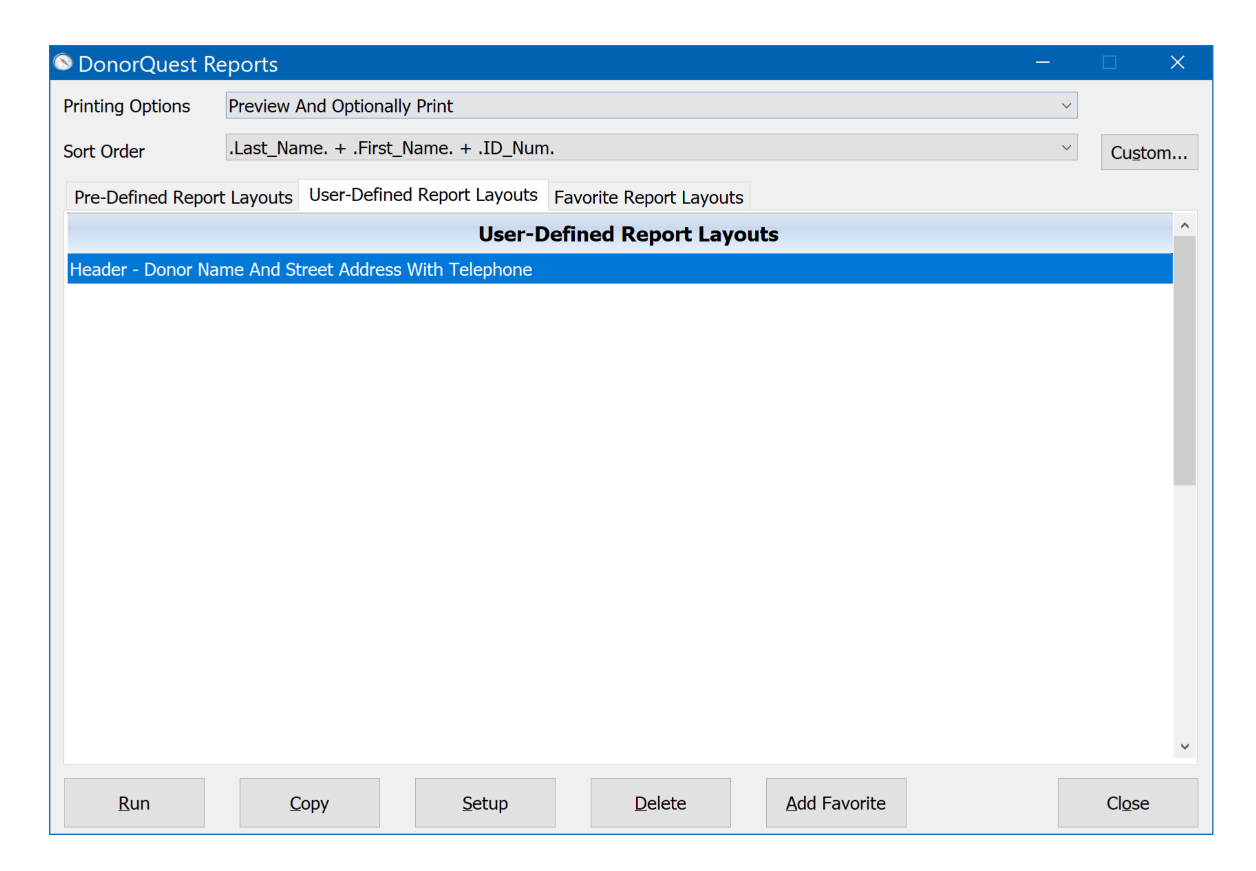
All Name/Address Records

Last Name	First Name	Address	Address2	City	State	Zip
Anderson	Brad	701 Galer St.		Seattle	WA	98109
Baker	Thomas	4968 Tardis Ave.		San Jose	CA	95112-3211
Bowie	Denise	123 First Avenue	Apt 200	San Jose	CA	95119-2312
Burke	James	826 Connections Way		Palo Alto	CA	94304-7899
Burke	James	1105 Information Avenue		San Francisco	CA	94175
Davidson	Peter	3775 Galafrey Way		Palo Alto	CA	94300-2112
Foster	James	14552 Medical Dr.		Saratoga	CA	95070-3212
Gore	Martin L.	Stanford OPA Bldg.		Eugene	OR	97401
Harrison	George	234 Abbey Road		San Francisco	CA	94161-2323
Harrison	Timothy	486 Intel Way.		San Jose	CA	95131-1234
Hayward	Justin	1701 Enterprise Way		Seattle	WA	98109
Jarre	Jean-Michel	644 Santa Rita		Seattle	WA	98109-1234
Kirk	James	1701 Enterprise Way		Mount Shasta	CA	96067-1234
Knight	Paula	1410 Holly Ave.		San Jose	CA	95133-4333
Koneig	John	12344 First Way		San Jose	CA	95135-2432
Lodge	John	71828 One Way		Yuba City	CA	95991-3171
McGoohan	Patrick	1984 In The Village		Oceania	CA	95070-3212
Musk	Elon	3141 Tesla Ave.		Fremont	CA	94538
Schmidt	Christopher	368 Moore Ave.		Saratoga	CA	95070-1234
Scott	Montgomery	685 Cherrystone Drive		Schenectady	NY	12345
Smith	John	4321 Another Smith Way		San Mateo	CA	94403
Waters	Roger	1234 Beyond The Wall Way		San Mateo	CA	94403

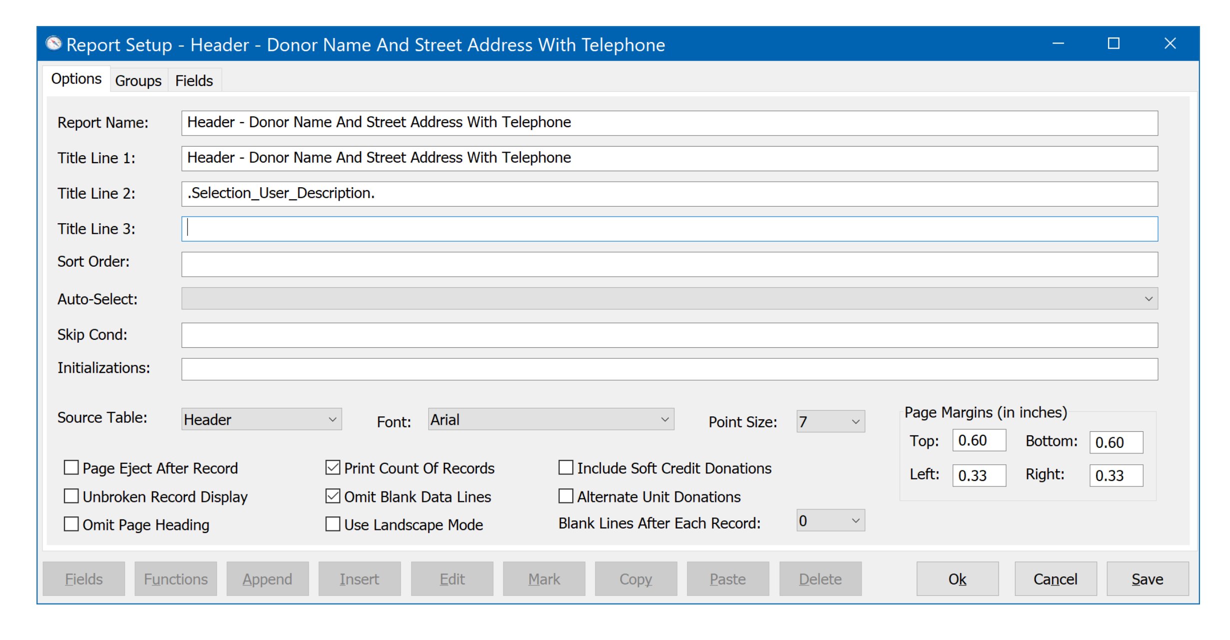
Now let's say we want to create a custom version of this report which also includes the main telephone number for each donor. To do this, close the preview and go back to the DonorQuest Reports window. With the, "Header - Donor Name And Street Address" report still highlighted, click on the Copy button of the DonorQuest Reports window. A Copying Report dialog will open. Enter the following:



Click the Ok button. You should see that the Reports window switches to the User-Defined Report Layouts tab, which will show your new report, like this:



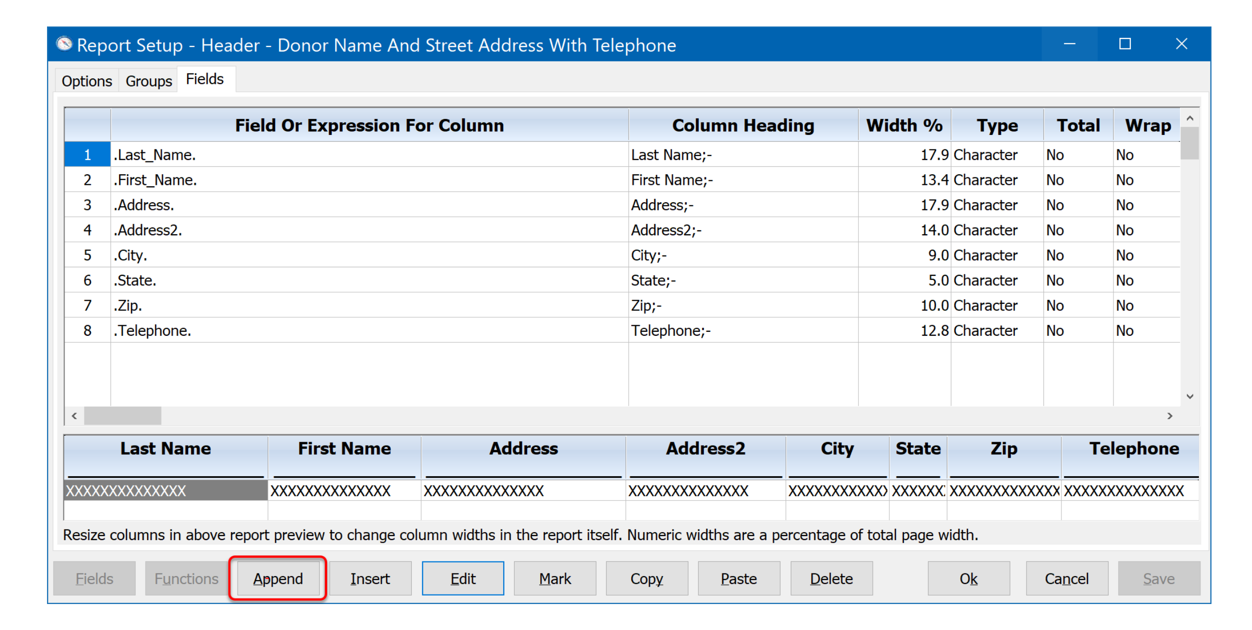
At this point the new custom report is different in name only -- it still has exactly the same columns as the original we copied from. Now to customize our new report with the Telephone field, click on the Setup button. This will open the Report Setup dialog, which looks like this:



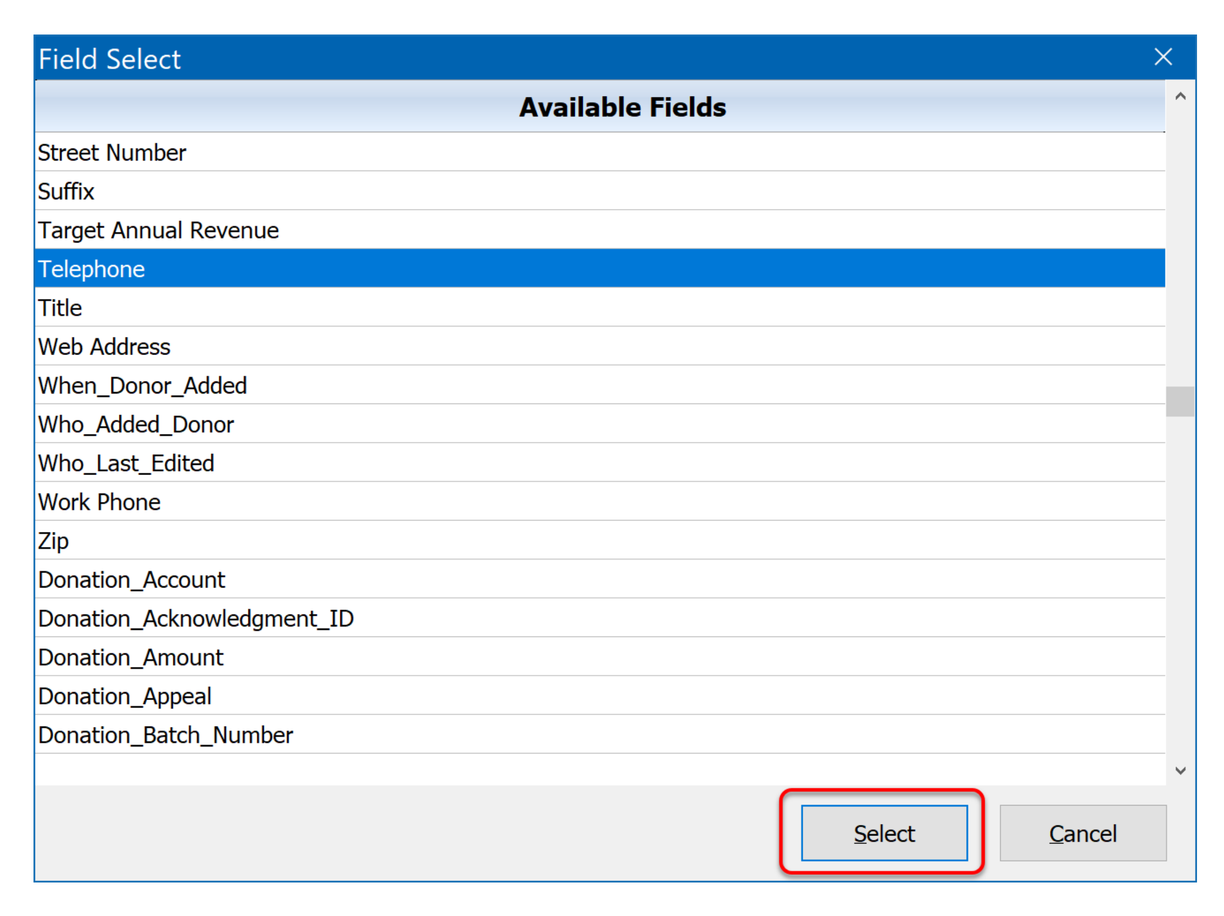
Copy the full name of the report shown in the Report Name to the Title Line 1 blank. This way the title of the report on the DonorQuest Report Menu will be the same as that which

prints at the top of each page for the report. This is important to do so that for any given printed report you have, you can always know which report layout was used to print it.

The Report Setup dialog is broken down into three tabs. There are help topics explaining the functionality of each of these tabs, but to complete our example click on the Fields tab. You should see:

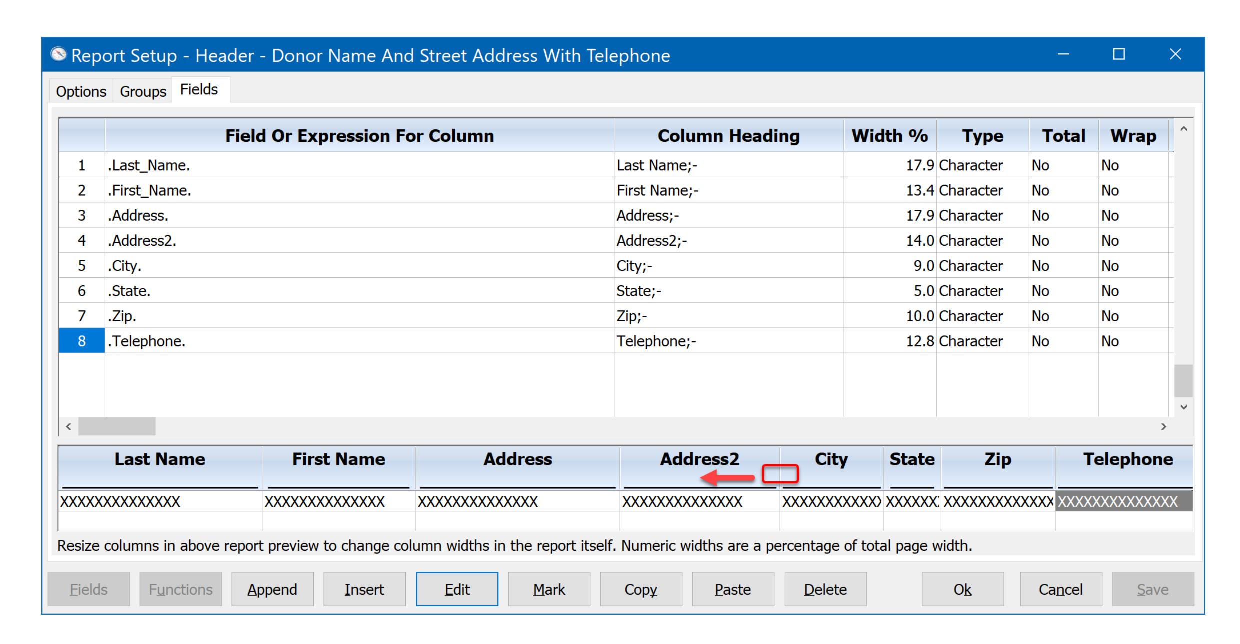


Notice there are two window panes -- the first with each line representing a column in the report (Last Name, First Name, Address, etc), and the second pane showing a sample depiction of the report columns. Our goal is to add the telephone field as a new column after the zip code. To do this, click on the Append button. You will then see the Field Select menu. Simply highlight the field you would like to add to the report (Telephone in our example) and click the Select button, or simply double-click the name of the field you want to add. The field menu looks like this:

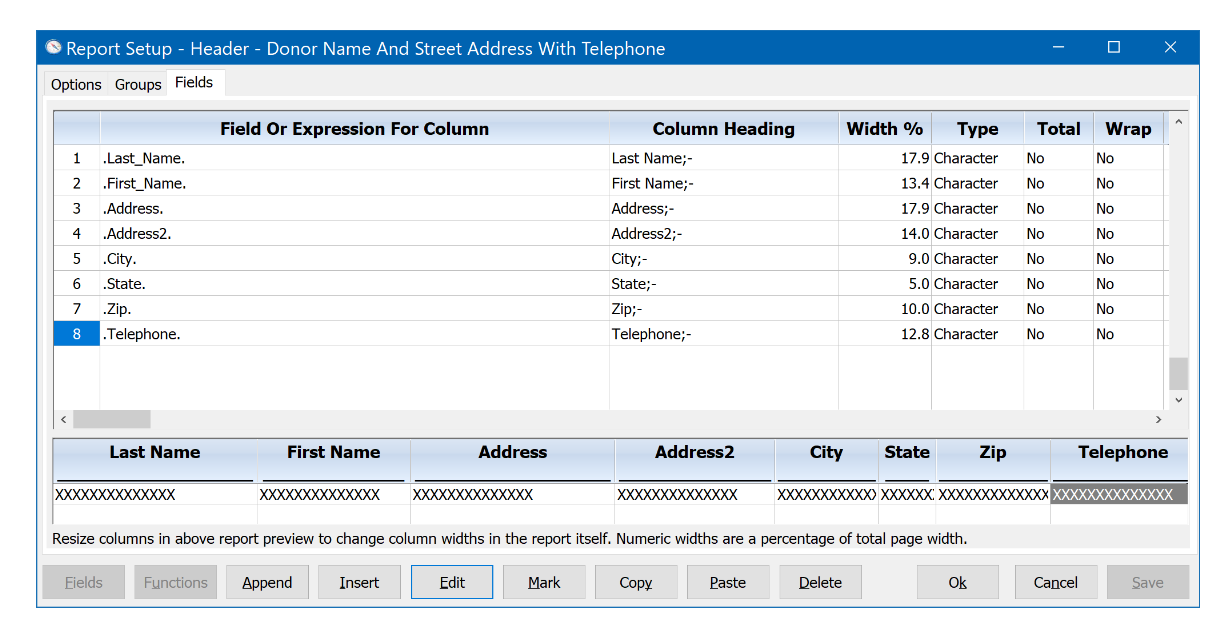


You will see the Report Setup window update to now have a new telephone field following the zip code. However, as you will notice, the new telephone column is too small. DonorQuest took the last column which was in the report -- the zip code column -- and reduced its width by half, giving the other half to the new telephone column. But you are able to resize the new assortment of report columns, distributing available page width more equitably. Column widths are based on a percentage of the available horizontal page width. So, when you add up the percentage allocation for all columns, it should come to 100%. You can resize any column, giving it more width. But the increased width for a column has to come from somewhere, so DonorQuest takes it from the columns to the right of the column you are resizing. Likewise, if you shrink a column, the space is given to the columns to the right of the one being resized.

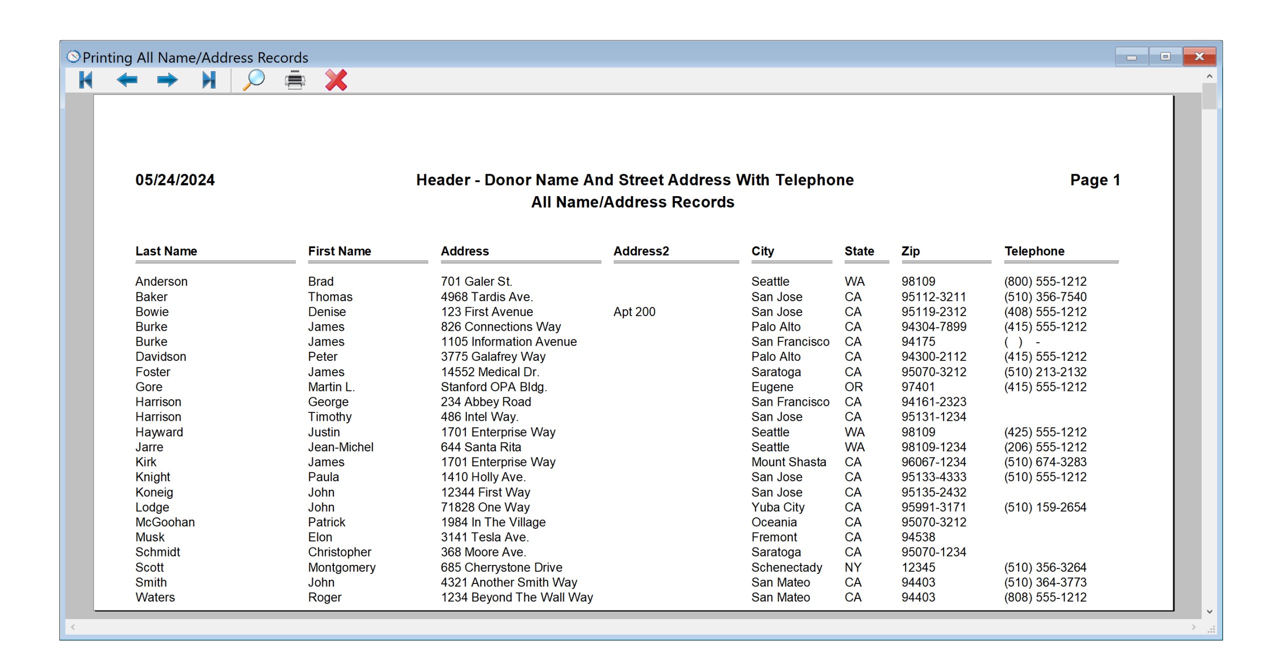
For example, lets shrink the Address2 column and see the effect it has on the columns to the right of it. Position the mouse pointer on the boundary between the Address2 and the City columns in the sample report pane, like this:



With the mouse pointer positioned in the area circled in red above, you should see the mouse pointer change to a bidirectional arrow like this <-->. With the left mouse button held down, drag the column boundary to the left, shrinking the Address2 column to about half its current size, then release the mouse button. Notice how the column to the right gained the space you freed up by shrinking the Address2 column. Repeat this process for the City, State, and Zip columns. You should now have a more equitable distribution of horizontal space between the columns, like this:



Click OK to save the changes to our new custom report, and then click the Run button of the DonorQuest Reports window to see a preview of our new custom report. It should look something like this:


Printing All Name/Address Records

05/24/2024 Header - Donor Name And Street Address With Telephone Page 1

All Name/Address Records

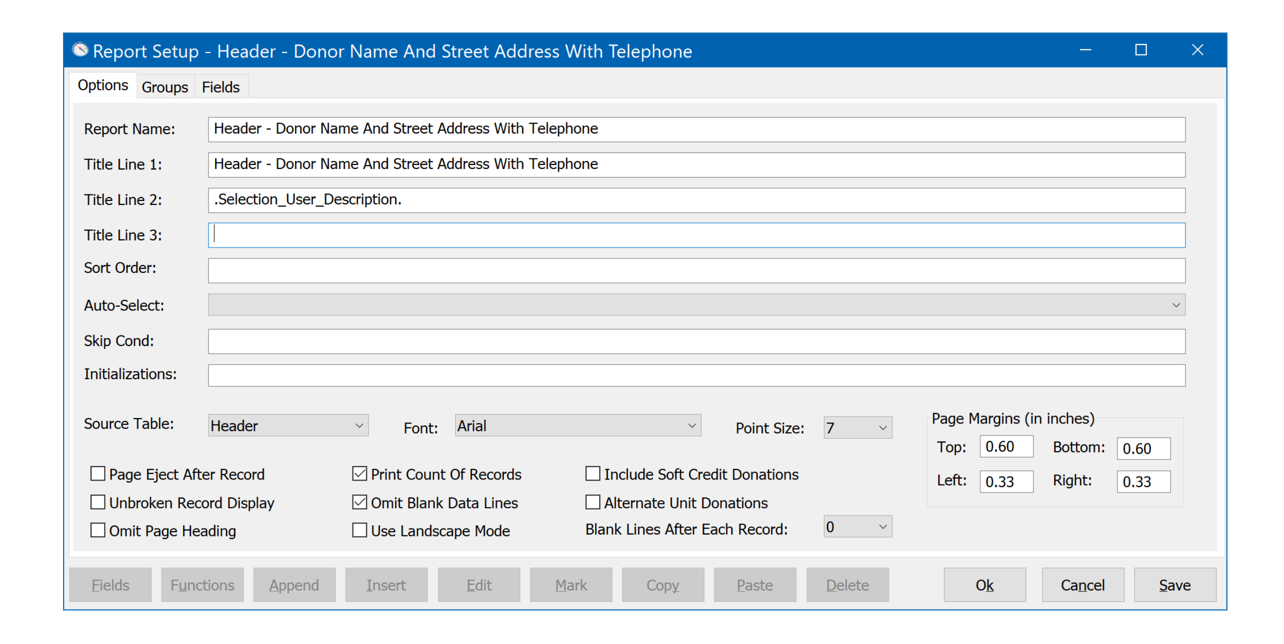
Last Name	First Name	Address	Address2	City	State	Zip	Telephone
Anderson	Brad	701 Galer St.		Seattle	WA	98109	(800) 555-1212
Baker	Thomas	4968 Tardis Ave.		San Jose	CA	95112-3211	(510) 356-7540
Bowie	Denise	123 First Avenue	Apt 200	San Jose	CA	95119-2312	(408) 555-1212
Burke	James	826 Connections Way		Palo Alto	CA	94304-7899	(415) 555-1212
Burke	James	1105 Information Avenue		San Francisco	CA	94175	( ) -
Davidson	Peter	3775 Galafrey Way		Palo Alto	CA	94300-2112	(415) 555-1212
Foster	James	14552 Medical Dr.		Saratoga	CA	95070-3212	(510) 213-2132
Gore	Martin L.	Stanford OPA Bldg.		Eugene	OR	97401	(415) 555-1212
Harrison	George	234 Abbey Road		San Francisco	CA	94161-2323	
Harrison	Timothy	486 Intel Way.		San Jose	CA	95131-1234	
Hayward	Justin	1701 Enterprise Way		Seattle	WA	98109	(425) 555-1212
Jarre	Jean-Michel	644 Santa Rita		Seattle	WA	98109-1234	(206) 555-1212
Kirk	James	1701 Enterprise Way		Mount Shasta	CA	96067-1234	(510) 674-3283
Knight	Paula	1410 Holly Ave.		San Jose	CA	95133-4333	(510) 555-1212
Koneig	John	12344 First Way		San Jose	CA	95135-2432	
Lodge	John	71828 One Way		Yuba City	CA	95991-3171	(510) 159-2654
McGoohan	Patrick	1984 In The Village		Oceania	CA	95070-3212	
Musk	Elon	3141 Tesla Ave.		Fremont	CA	94538	
Schmidt	Christopher	368 Moore Ave.		Saratoga	CA	95070-1234	
Scott	Montgomery	685 Cherrystone Drive		Schenectady	NY	12345	(510) 356-3264
Smith	John	4321 Another Smith Way		San Mateo	CA	94403	(510) 364-3773
Waters	Roger	1234 Beyond The Wall Way		San Mateo	CA	94403	(808) 555-1212

Deleting Report Layouts

The Delete button of the DonorQuest Reports window will delete the currently highlighted user-defined report. Predefined report layouts can not be changed or deleted, so the Delete button will be inactive when the Pre-Defined Report Layouts tab is selected.

8.9.1 Options Tab

The Options Tab of the Report Setup offers basic formatting options for the report, such as margins and font control. Here is what the Options tab looks like for the sample report layout we created in the previous topic on Creating And Editing Report Layouts:



Report Name

This is the name of the report as it appears on the DonorQuest Report Menu. Generally you should keep the Report Name and the Title Line 1 the same so that given a printout of the report, a user could easily find the report on the Report Menu in order to run it again.

Title Lines 1..3

Each report may have up to three separate lines which appear at the top of each page of the printed report. Normally these lines are literal phrases, but they may also include the special variable ".Selection_User_Description." When printing a selection result with the report, the name given to the selection result will be substituted in the report heading for this variable. An example of this is shown in the Quick Start topic on Creating Selections in which the name we gave a zip code selection is included in the title of the report we used to print the zip code selection.

Sort Order

This is an optional order which can be specified if you want to require that a report always be ordered in a particular way -- by Last Name or Address for example. This will prevent anyone using the report from ordering it on-the-fly in a different way. The Sort Order may be any valid character expression, usually simply the name of a field in DonorQuest, or an expression involving multiple fields. For example, to order by First Name within Last Name, you would use the following expression for the sort order:

.Last_Name. + .First_Name.

You may also apply functions to fields to achieve very special sort orders. Functions can be particularly useful when you want to alphabetize the report on a transformed version of the data within a field or fields. For example, the Descend() function will transform the data of a field such that the report will be alphabetized in descending order by the field to which

you apply the Descend() function. While entering a sort expression, you may use the Field Assist and Function Assist buttons for help with entering field and functions names.

The sort expression may also be used to alphabetize a report in special ways that could not be done via the on-the-fly Sort Order option available when printing a report. Using the wealth of functions available in DonorQuest, you could actually alphabetize a report based on information within data fields. For example, using the Get_Token() function, you could alphabetize a report based on the name of streets in the address field, ignoring the numbers which normally precede each street name. The following Get_Token() usage would accomplish this:

Get_Token(.Address., 2, " ")

This usage of Get_Token() takes advantage of the fact most addresses start with a group of characters (letters or numbers) which are followed by a space, and then the street name which is followed by yet another space.

Fields like Last Name, First Name, and Address are character fields. If you wish to mix character fields with other types of fields (such as date or numeric) in a single sort expression, you will have to use the appropriate conversion function to convert fields of date or numeric type to character. For example, to alphabetize donors by donation total, last name, and first name, you would use the following expression:

Str(.Donation_Total., 12, 2) + .Last_Name. + .First_Name.

For more information on the Str() and other functions, please refer to the topic on Available Functions.

Auto-Select

The Auto-Select ties into the Pre-Defined and User-Defined selection filters in DonorQuest. These types of selection filters are self-contained, requiring no input from the user. They accomplish a specific filtering action. When you link to one of these for a report layout, the selection is automatically run prior to printing the report, and the result of the selection is then used to print the report.

Skip Condition

The report Skip Condition acts as a mini-filter. It is similar to a selection, but acts directly as the report is printing to filter out unwanted records. As an example, the "Header - Top 10 Donor" report uses it to automatically filter out any constituents which have no giving. This could also have been done with the Auto-Select feature, but it is simpler because the Skip Condition does not require a companion selection definition to be created and always be available for use when the report is run. The Skip Condition is suitable for very simple filter actions which should always be desirable for the report -- even when it is run from a selection result. For example, you might run the "Header - Top 10 Donor" report for a selection of Header (constituent) records in a certain zip code, but it would still always be true that the report should only consider records with a giving history. The Skip Condition is an expression which must evaluate to true or false.

Initializations

This is a place used to initialize any user-defined variables you may have included in the report. For example, you may have a numeric variable which keeps track of how many report lines have printed so far as the report runs. You would want that variable to be initialized to 1 before the report begins printing. The directives you place in the Initializations blank will always be executed before the report begins printing.

Source Table

While some report layouts are suitable to be printed from any of the seven tables in DonorQuest, most are designed to work with a specific table. By convention, the name of a report should always begin with the name of the table it was designed to focus on. You can see this in the names of most pre-defined report layouts included with DonorQuest.

Font

This is the font for the report. All parts of the report will be printed using this font.

Point Size

This is the point size which will be used for the body of the report (all the data). DonorQuest will automatically print the column titles and page headings a few points bigger than this and in bold to help them to stand out from the data.

Page Eject After Record

Turn this on if you want a new page to begin after each donor's record is printed. This is normally only used for multi-banded reports, in which the information for a single donor covers many lines and typically takes up most of a page. The predefined report titled, "Header - Complete Information On Each Donor" is an example of a report like this.

Unbroken Record Display

For reports showing multiple gifts per donor (or pledges, memos, etc), DonorQuest will begin a new page if the remaining space on the current page is not enough to show all the information for the current donor without splitting it across pages. If a donor has too much information for a single page (as is often the case for donors with large donation histories), this setting has no effect -- the donor history will have to be spread across multiple pages. If the Page Eject After Record option is turned on, this option also has no effect, since each donor will begin on a new page anyway.

Omit Page Heading

Turn this on if you do not want any report heading printed. This is unusual, but very useful for specialized reports -- such as the, "Header - Envelopes (Using Salutation1)" report which prints mailing addresses directly on envelopes.

Print Count Of Records

This option simply prints a count of the records printed in the report on the last page of the report.

Omit Blank Data Lines

Turn this on for reports which print multiple lines of data for a single donor when there is a possibility one or more of the lines may be blank. For example the, "Header - Envelopes (Using Salutation1)" report includes the Address2 field, which is likely blank for many addresses (it's the apartment or suite number). Having the Omit Blank Data Lines option turned on will prevent a blank line from appearing in the middle of the address on an envelope for those addresses which do not have anything in the Address2 field.

Use Landscape Mode

Turn this on for landscape mode printing when you need more horizontal column space. This rotates the printing to give you as much horizontal printing space as possible.

Include Soft Credit Donations

When printing a header-based report which also includes fields from the donations table (such as the "Header - Donation History Report, All Donations" report), DonorQuest will automatically print all hard monetary donations for each donor. Turning this option on will tell DonorQuest to also include all soft credits for each donor coming from other donors. The predefined report titled, "Header - Donation History Report, Soft Credit Donations Received Only" makes use of this option.

Include Alternate Unit Donations

Normally when printing any report involving donation fields, DonorQuest will automatically filter out any non-monetary (Alternate Unit) donations, because mixing money with hours of time or pounds of food donations would not make sense, especially where donation totals are concerned. However, when a report is specifically designed to print donations of hours, pounds, etc., then this option should be turned on. The predefined report titled, "Donations - Donation Detail Report Including Alternate Unit Donations" makes use of this option.

Blank Lines After Each Record

When printing multi-banded header-based reports which may have multiple lines per donor, this setting allows you to control how many blank lines will print between donor records on the same page. This setting is ignored if Page Eject After Record is turned on.

Page Margins

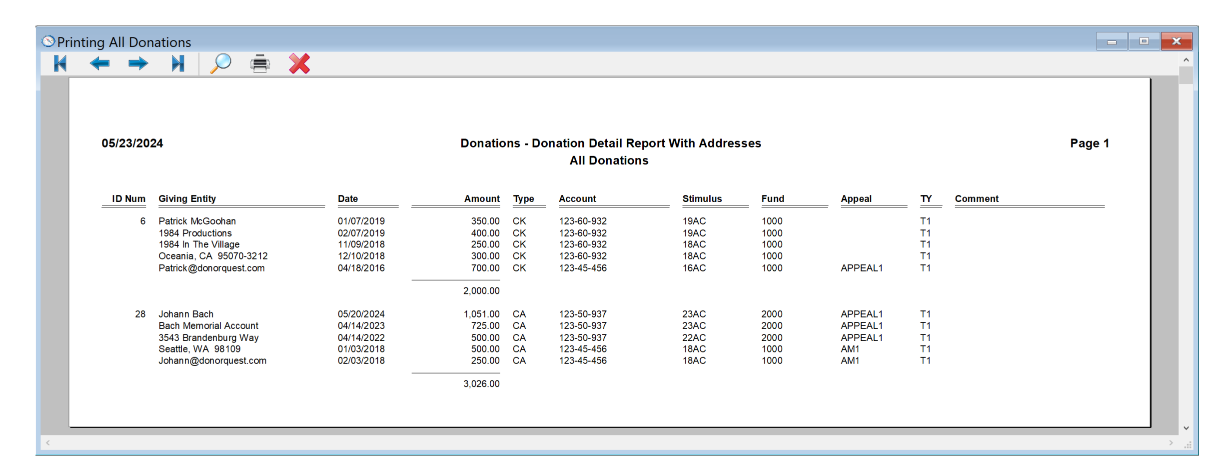
Here you can set the Top, Left, Bottom, and Right page margins. Units are in inches.

8.9.2 Groups Tab

The Groups Tab of the Report Setup allows you to control totalling and sub-totalling in reports. While any report can be made to give a grand total for columns containing a

numeric field (such as Donation Amount), grouping allows you to get totals "along the way" before the end of the report. It allows you to break the body of the report up into meaningful groups and get totals for those groups, with their totals going into the grand totals on the last page of the report. Grouping is optional, and only reports which need subtotals make use of them. For most reports, you would just leave the options of the Groups tab blank.

A good example of a grouping report is the, "Donations - Donation Detail Report With Addresses." This is a donation-based report, so it focuses on the Donations table, and must be run either directly from the donations table, or from a selection result based on it. But the report also includes biographical information - the donor's name and address. So it makes sense to group the donations of the report by the donors they belong to. That way all the donations for a particular donor appear together (instead of being scattered at random), and best of all we can get subtotals of total giving by donor for all the donations included in the report. Here is what the report looks like:

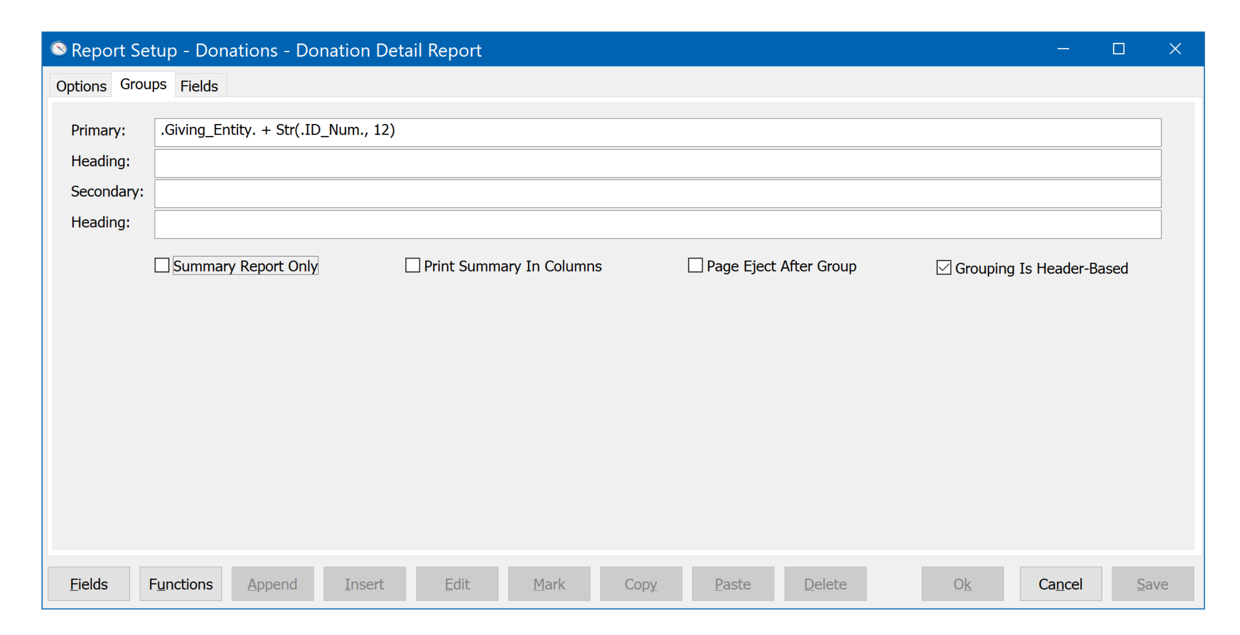


Printing All Donations

05/23/2024 — Donations - Donation Detail Report With Addresses — Page 1
All Donations

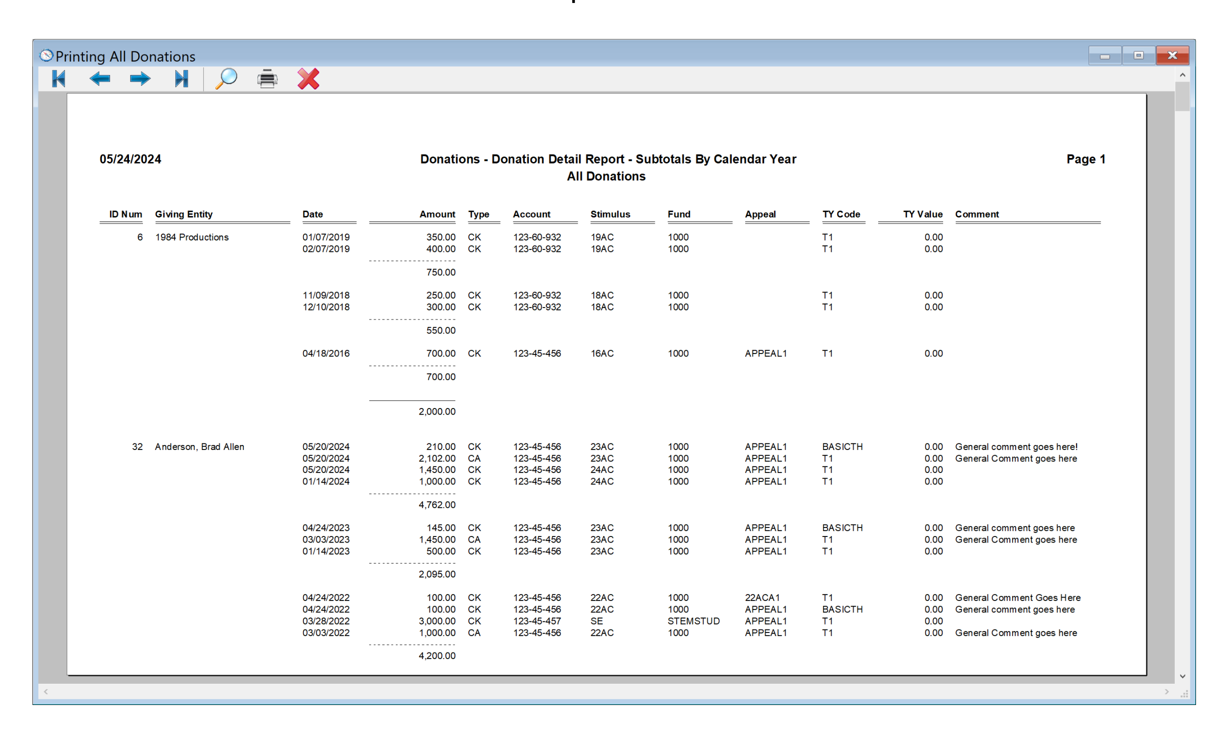
ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY	Comment
6	Patrick McGoohan	01/07/2019	350.00	CK	123-60-932	19AC	1000		T1	
	1984 Productions	02/07/2019	400.00	CK	123-60-932	19AC	1000		T1	
	1984 In The Village	11/09/2018	250.00	CK	123-60-932	18AC	1000		T1	
	Oceania, CA 95070-3212	12/10/2018	300.00	CK	123-60-932	18AC	1000		T1	
	Patrick@donorquest.com	04/18/2016	700.00	CK	123-45-456	16AC	1000	APPEAL1	T1	
			2,000.00							
28	Johann Bach	05/20/2024	1,051.00	CA	123-50-937	23AC	2000	APPEAL1	T1	
	Bach Memorial Account	04/14/2023	725.00	CA	123-50-937	23AC	2000	APPEAL1	T1	
	3543 Brandenburg Way	04/14/2022	500.00	CA	123-50-937	22AC	2000	APPEAL1	T1	
	Seattle, WA 98109	01/03/2018	500.00	CA	123-45-456	18AC	1000	AM1	T1	
	Johann@donorquest.com	02/03/2018	250.00	CA	123-45-456	18AC	1000	AM1	T1	
			3,026.00							

And here is the grouping setup for the report:



The Giving Entity is the donor's first and last name for individual donors, and the organization name for corporate donors. The use of the ID Number in the grouping expression guarantees a unique key for each donor account. This takes care of the case of there being, for example, donations for two John Smith's in the report. If not for the ID Number being included, there would be nothing to distinguish between the two Smiths and their donations would appear together and get sub-totalled together.

DonorQuest actually supports two levels of grouping. Let's say that in addition to grouping donations by the donors to which they belong, we also want to get sub-sub-totals by year for the donations belonging to each donor. The pre-defined report which comes with DonorQuest titled, "Donations - Donation Detail Report, Subtotals by Calendar Year" handles this with ease. Here's what the report looks like:

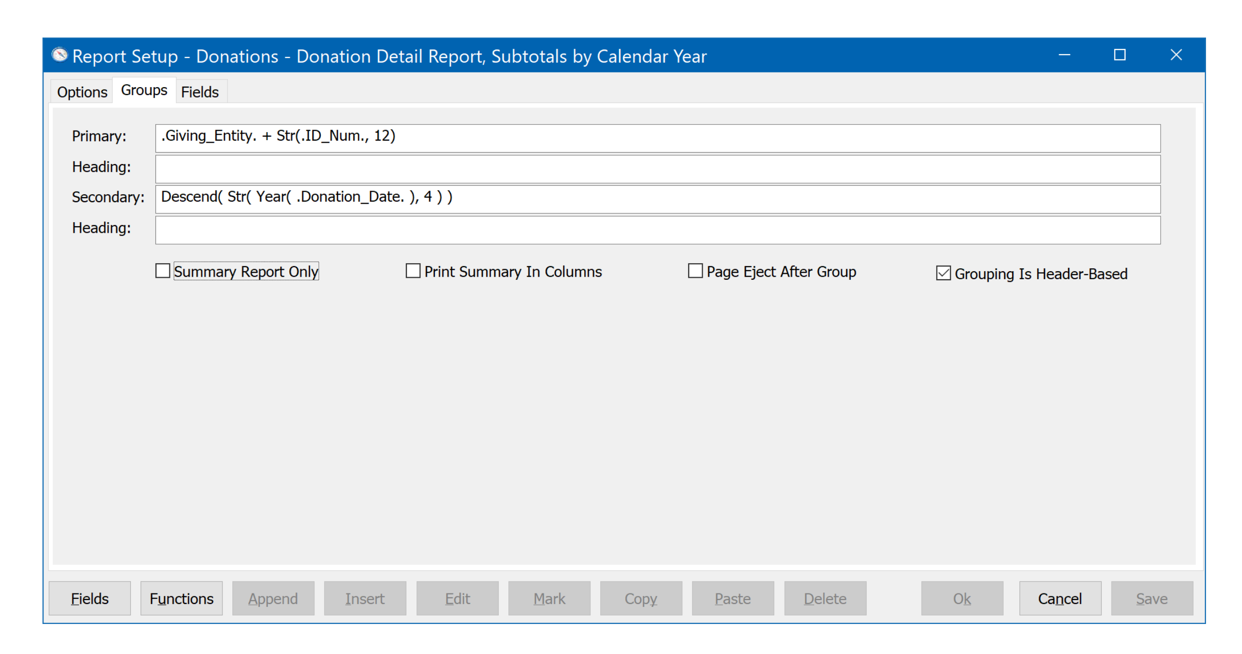


05/24/2024 Donations - Donation Detail Report - Subtotals By Calendar Year Page 1

All Donations

ID Num	Giving Entity	Date	Amount	Type	Account	Stimulus	Fund	Appeal	TY Code	TY Value	Comment
6	1984 Productions	01/07/2019	350.00	CK	123-60-932	19AC	1000		T1	0.00	
		02/07/2019	400.00	CK	123-60-932	19AC	1000		T1	0.00	
			750.00								
		11/09/2018	250.00	CK	123-60-932	18AC	1000		T1	0.00	
		12/10/2018	300.00	CK	123-60-932	18AC	1000		T1	0.00	
			550.00								
		04/18/2016	700.00	CK	123-45-456	16AC	1000	APPEAL1	T1	0.00	
			700.00								
			2,000.00								
32	Anderson, Brad Allen	05/20/2024	210.00	CK	123-45-456	23AC	1000	APPEAL1	BASICTH	0.00	General comment goes here!
		05/20/2024	2,102.00	CA	123-45-456	23AC	1000	APPEAL1	T1	0.00	General Comment goes here
		05/20/2024	1,450.00	CK	123-45-456	24AC	1000	APPEAL1	T1	0.00	
		01/14/2024	1,000.00	CK	123-45-456	24AC	1000	APPEAL1	T1	0.00	
			4,762.00								
		04/24/2023	145.00	CK	123-45-456	23AC	1000	APPEAL1	BASICTH	0.00	General comment goes here
		03/03/2023	1,450.00	CA	123-45-456	23AC	1000	APPEAL1	T1	0.00	General Comment goes here
		01/14/2023	500.00	CK	123-45-456	23AC	1000	APPEAL1	T1	0.00	
			2,095.00								
		04/24/2022	100.00	CK	123-45-456	22AC	1000	22ACA1	T1	0.00	General Comment Goes Here
		04/24/2022	100.00	CK	123-45-456	22AC	1000	APPEAL1	BASICTH	0.00	General comment goes here
		03/28/2022	3,000.00	CK	123-45-457	SE	STEMSTUD	APPEAL1	T1	0.00	
		03/03/2022	1,000.00	CA	123-45-456	22AC	1000	APPEAL1	T1	0.00	General Comment goes here
			4,200.00								

Notice how for the corporate donor "1984 Productions", the donation history is sub-totaled by calendar year -- showing $750 for the two donations in 2014. This is the grouping setup for this report:



The secondary grouping factor is what accomplished the subgrouping and totalling by calendar year. It made use of three DonorQuest functions - Year() to extract the 4-digit year from the Donation Date, Str() to convert that numeric year to a character value, and finally Descend() to arrange for the donations to be in descending order by year for each donor. The extensive library of functions available in DonorQuest extend its power considerably, and they are all documented in the topic on DonorQuest functions.

And now for a formal definition of each Grouping option:

Primary Grouping

The primary grouping is a character expression which is evaluated for every record in the report. Records are ordered by the evaluation of the Primary Grouping, so that records which should be in the same group will occur consecutively as the report prints. When DonorQuest detects that the primary grouping value will be different for the next record, it prints totals for all columns designated for totalling, resets it's internal group totals to zero, and begins the next group.

Primary Group Heading

The primary group heading is optional. Notice the, "Donations - Donation Detail Report With Addresses" report shown above did not use a group heading, because the information defining each group (the donor name) was already included in the body of the report. An example of a pre-defined report which does using the Group heading feature is the, "Donations - Grouped By Calendar Year" report. If you click on the Setup button for this report and look at the Groups tab, you will see "Year: " in the primary group heading, and if you preview the report, you will see where DonorQuest prints "Year: " followed by the actual year for the group.

Secondary Grouping

The secondary grouping behaves just like the primary, except that it does its work within

the confines of the current primary grouping as a report unfolds. The pre-defined report titled, "Donations - Donation Detail Report, Subtotals by Calendar Year", shown above, illustrates how this works.

Secondary Group Heading

As with the Primary group heading, the secondary group heading is optional. It will not affect the functioning of the groupings. It is purely informational in nature, showing the grouping keys as they change. If the body of your report has columns which include the secondary grouping key, then you don't need it to be printed again. The "Donations - Donation Detail Report, Subtotals by Calendar Year" report shown above is a good example. The secondary grouping for it is the year of the donation date. But since the donation date is already showing in the body of the report, there is no need to print the year again (which is what the secondary grouping for that report is based on).

Summary Report Only

If this option is enabled, then only the totals and subtotals for the report will be shown, without the transaction detail from which the totals are derived.

Print Summary In Columns

This option may only be used when Summary Report Only is enabled, and the report only has one grouping level (no sub-grouping). When enabled, it will print totals in the data columns designated for totalling. For example, the pre-defined reports, "Donations - Grouped By State" and "Donations - Grouped By State - Summary" show the same totals, except the later has the Summary Report Only and Print Summary In Columns options turned on and omits the donation detail for the totals.

Page Eject After Group

Turn this option on if you would like each group to begin on a new page.

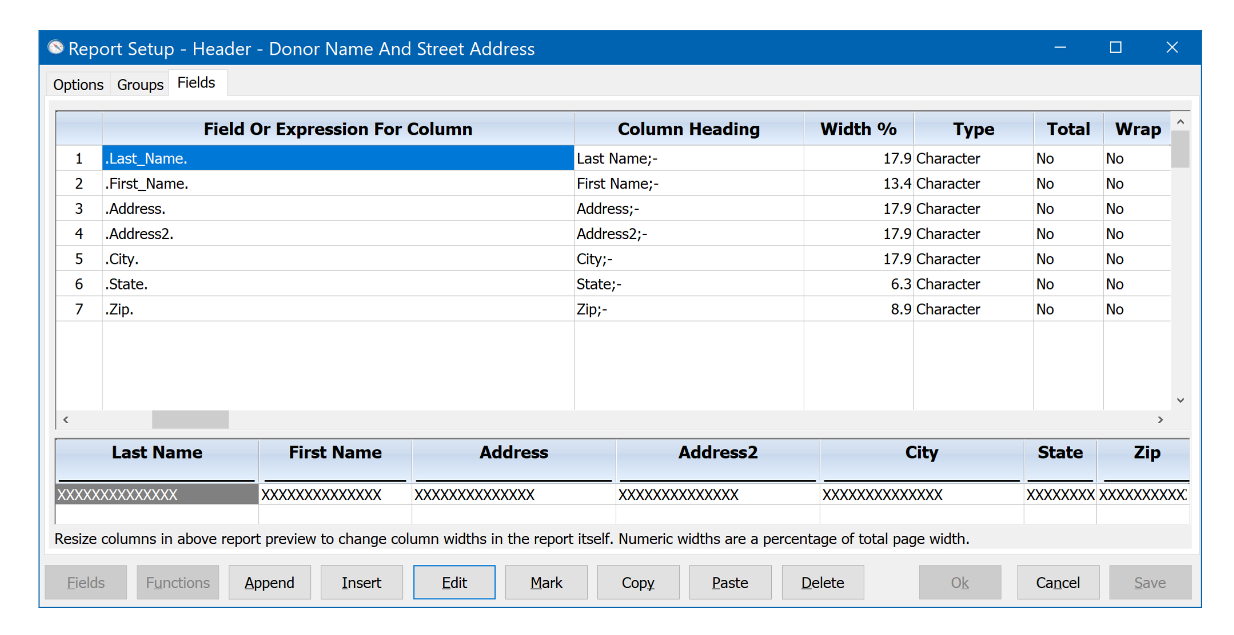
Grouping Is Header-Based

When the report is based on one of the tables for which a donor may have many records (such as the donation table), but the grouping is based on a field in the Header table, this checkbox should be set on. This will prevent the header field information included in the report from printing more than once for each donor.

8.9.3 Fields Tab

The Fields Tab of the Report Setup is where the body of the report is defined -- the actual data columns. Data fields and columns are usually synonymous, though columns may also be based on formulas involving one or more data fields, or values from adjacent columns. It's a bit like the functionality in a spreadsheet. Columns have several attributes such as content, title, width, and whether or not the column is to be totalled if it is a number. The opening topic on Creating and Editing Report Layouts touches on the Fields Tab briefly in the example of how to copy and customize one of the pre-defined reports

included with DonorQuest. We will now cover the attributes of the Fields tab in more detail, using the pre-defined report, "Header - Donor Name And Street Address" as an example. Here is what the Fields Tab looks like for that report:



Additional attributes are shown in the upper window pane of the Report Setup window if you move the horizontal scroll bar to the right, or just move the highlight to the right with the right-pointing arrow key.

Field Or Expression For Column

This attribute specifies the actual content of the column. Normally it is just a simple field name, though it could be a formula involving one or more DonorQuest fields and functions.

Column Heading

This is simply the title for each column of the report. The heading for each column may have multiple lines, and a semicolon (;) is used to separate what is to go on each line. The special notation of ;- will cause a line to be drawn across the entire width of the column, effectively underlining the column heading.

Width %

This is the width of each column. It is expressed as a percentage of the total available horizontal space on the printed page. So for example, if your report only had two columns, and you wanted them to share the page equally, they would both have a width of 50. Increasing the width percentage of a column will take away from the columns to the right, and decreasing the width percentage of a column will distribute the extra space proportionately to the columns on the right.

Type

This is the data type of the report column. DonorQuest determines this based on the field

or formula in the Field Or Expression For Column. It is displayed for your information. Columns will be either Character, Date, or Numeric. Numeric columns may be totaled by turning on the Total option for the column.

Total

When totalling is enabled for a numeric column, then a total for that column will be shown on the last page of the report. For reports using grouping, subtotals will also be shown.

Wrap

When there is too much textual data to fit in the allotted width of a column (which is typically the case for the Donation Comment or the donor NotePad), turning on the Wrap attribute will use additional lines while printing as needed to print all the text in a field. Without wrapping turned on, text which would extend beyond the column width is simply not printed.

Data Formatting Template

Formatting Templates allow you to format the raw field data into more attractive forms -- for example adding commas and a dollar sign to monetary amounts. Templates consist of one or more special characters which serve as a model of how the raw data is to be formatted. For example, the "!" symbol transforms individual characters at specific positions to upper case. Following is a list of the available Template Control Characters:

9	Displays digits for any data type including sign for numeric values.
!	Converts alphabetic character to upper case.
$	Displays a dollar sign to the left of a numeric value.
.	Specifies a decimal point position.
,	Specifies a comma position.

In practice you will normally only make use of the formatting for numeric fields. Here are a few examples:

999,999,999,999 Prints a whole number with commas, but no decimals.
999,999,999,999.99 Prints amounts with commas and two decimal places.
>$999,999,999,999.99 Prints dollar amounts with a dollar sign kept flush against the left most digit.

Column Print Condition

This is a true/false expression which must be true for the current record's data to print in the column. This is a way for a report layout to do some additional filtering which is a permanent part of the report. For example, the "Header - Donation History Report, All Donations" has separate columns for monetary and non-monetary (Alternate Unit) gifts. It accomplishes this by imposing the following print condition for the monetary donations column:

```
!IsAltUnit( .Donation_Type. )
```

The IsAltUnit() function will return true if a donation is of alternate unit type (non-monetary). The exclamation mark means "not." So the condition is simply saying that for a donation to print in that column, it can not be an alternate unit donation.

Hide Column

This is used only for very special reports in which you may need a column to exist to hold intermediate values used in a calculation at the end of the report, but you don't actually want it to print for each record of the report. An example can be found in the, "Donations - Grouped By Calendar Year" report, which uses two hidden columns to count the number of monetary and non-monetary donations, so that these counts can be shown with the totals at the end of the report. The column uses a simple counting technique of literally have a 1 for the Field Or Expression For Column, which serves to count the number of records meeting the two different Column Print Conditions. But there's no point in showing a 1 repeatedly running down the column in the body of the report, so the Hide Column attribute is turned on for the counter columns.

Print Once

DonorQuest is a relational database with there being only one record in the master Header table for each constituent, but potentially multiple records in the Donation, Pledge, Contact, etc. tables for each constituent. In database terminology, the Header table is the Parent table, and all the other related tables are Child tables. When creating a Header (constituent) based report layout which also includes fields from child tables such as Donation, Pledge, Contact, etc., normally all Donations, Pledges, etc. are shown for each master (Header) table record. If you wish only the first related record of a given child table to be shown, enable the Print Once option.

VTrim Column

VTrim stands for Vertical Trimming. It will eliminate blank lines in a column. This is only needed for columns which are printing long character fields -- such as the DonorQuest NotePad. With vertical trimming on, blank lines which may have been entered in the DonorQuest NotePad for a donor will not waste space in the report. This feature is also handy if you are constructing a character expression involving multiple character fields you would like to stack vertically, and you want to account for some of the fields possibly being empty. An example of this is found in the, "Header - Complete Information On Each Donor" report, which is the most complex of all the pre-defined reports included with DonorQuest. It uses just about every feature of the DonorQuest report writer!

Eval Before Column

This is a rarely used reporting feature, intended mainly to support the use of report variables which need to be updated during the running of a report. The expression in this column attribute is evaluated before the column data expression.

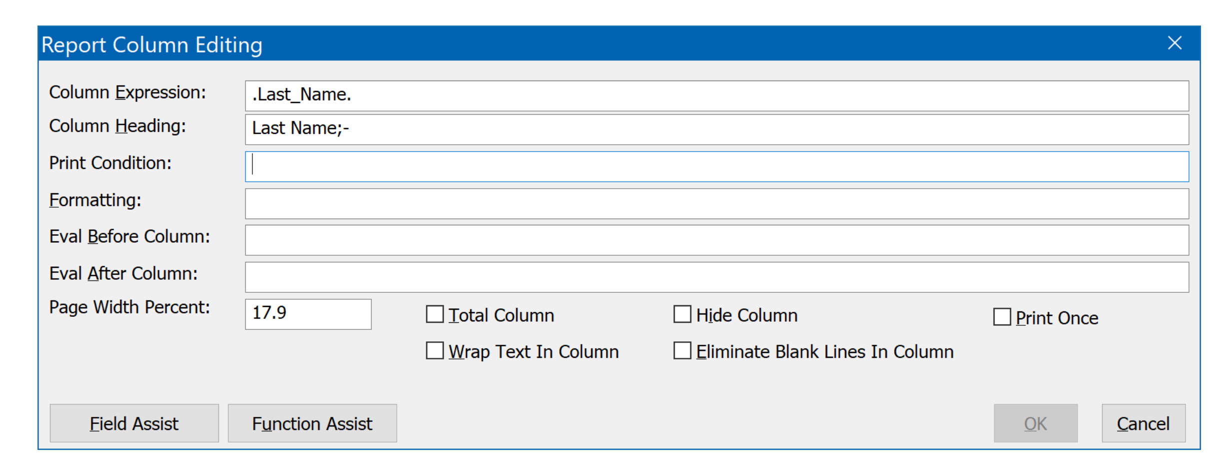
Eval After Column

This is also a rarely used reporting feature, intended mainly to support the use of report variables which need to be updated during the running of a report. The expression in this column attribute is evaluated after the column data expression.

The Report Setup Append, Insert, And Edit Buttons

The Append button is used to add a new column to the report to the right of all columns currently defined. The Insert button will add a new column at the current edit position given by the blue highlight. When a new column is added by either button, the Field Select menu will appear, allowing you to choose the field you wish to have in the column. Typically a single field is all you would have in a given column, though field expressions involving multiple fields in a single column are also supported.

When you need access to the various attributes controlling how an existing column is printed, you may click the Edit button (or just double-click on any attribute of the report column in the upper window). The Report Column Editing dialog will then open, allowing you to configure the newly added column. For example, with the Last Name column highlighted as shown above, clicking the Edit button would display:



The Field and Function Assist buttons of the Report Column Editing dialog will open a menu of available DonorQuest fields and functions to use with the column attributes which support expressions, such as the Column Expression and the Print Condition.

The Report Setup Copy And Paste Buttons

These buttons allow you to copy and paste an entire column definition within the current report layout, or between report layouts. You may also copy and paste a block of column definitions by first using the Mark button to mark multiple column definitions. The columns you copy remain in the paste buffer between report editing sessions, allowing you to copy columns from one report layout to another.

The Report Setup Mark Button

This button allows you to mark multiple column definitions for copying or deletion.

The Report Setup Delete Button

This button will delete any marked column definitions. If no column definition is marked, the currently highlighted column definition will be deleted.

Topic IX

9 Labels

Labels are very similar to Reports in that they are simply page layouts. But they are special in that they have the ability to print multiple donor records horizontally on sheets of labels, typically three-across (though DonorQuest can print up to six across). As with reports, labels are driven by Selection Results. The selection process determines which constituents will be printed, and the label layout you choose determines what information about each constituent will print. DonorQuest has pre-defined labels which support the standard Avery 5160 and 5161 layouts, and you can also create and customize your own labels in DonorQuest for any other layout, using the provided pre-defined layouts as a starting point.

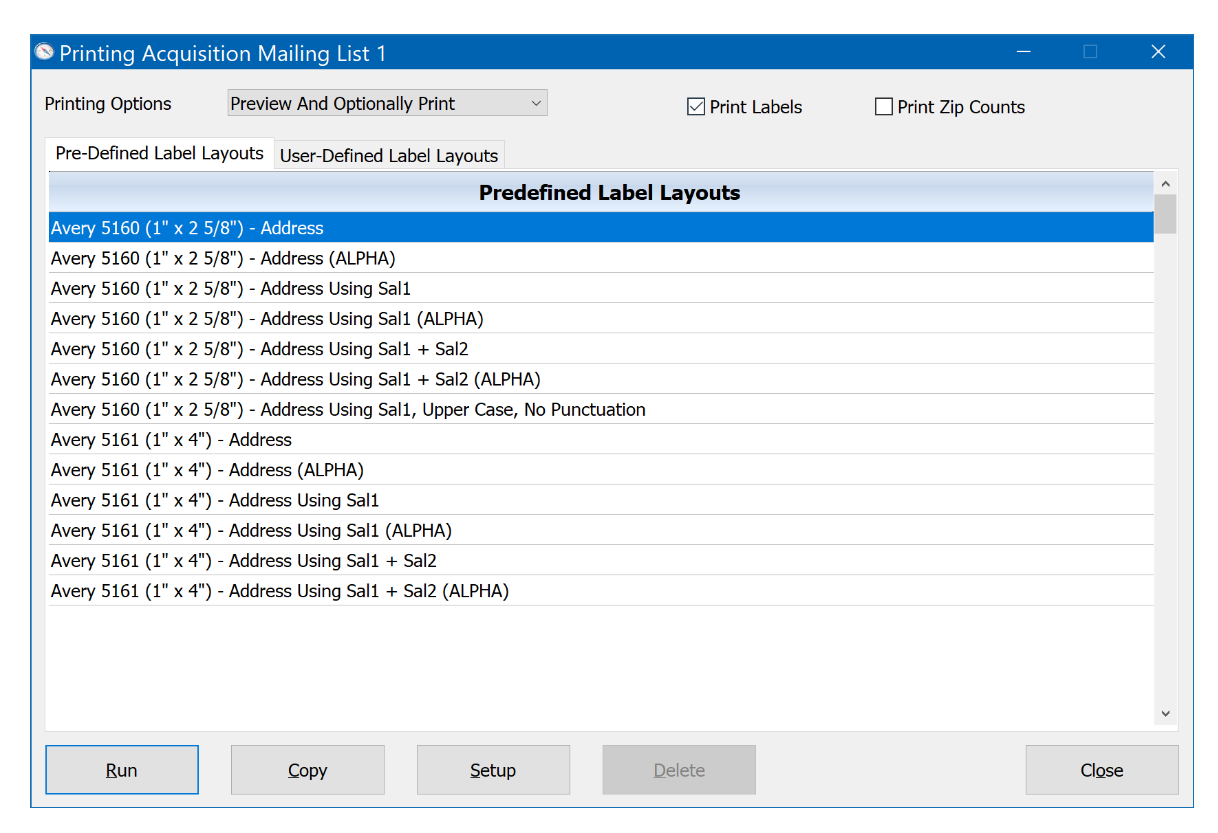
The most widely used pre-defined label layout in DonorQuest is the, "Avery 5160 (1" x 2 5/8") - Address Using Sal1" layout, which makes use of the Salutation1 field to form the first line of each label. Salutation1 is the formal salutation for the each donor, and it is also used for joint salutations for couples. With it, you are able to print a salutation which is precisely how the donor wants to be addressed. There are other label layouts which draw upon the first and last name fields instead of using Salutation1, but they are not recommended because no formula can reliably string together multiple fields (such as Title, Primary & Secondary Names, Suffixes), and account for all donor preferences. That's why the use of the Salutation1 field is so important in DonorQuest.

9.1 Printing Labels

The process for printing mailing labels in DonorQuest is similar to printing reports. As with reports, all labels are user-configurable. For each label, the definition of which fields to print, and the layout in which to print them is completely under your control. DonorQuest is shipped with several label layouts already defined for you. This topic will explain how to print using these label layouts, and any others that you may later define. The process of defining labels is covered in a separate topic on Creating And Editing Label layouts.

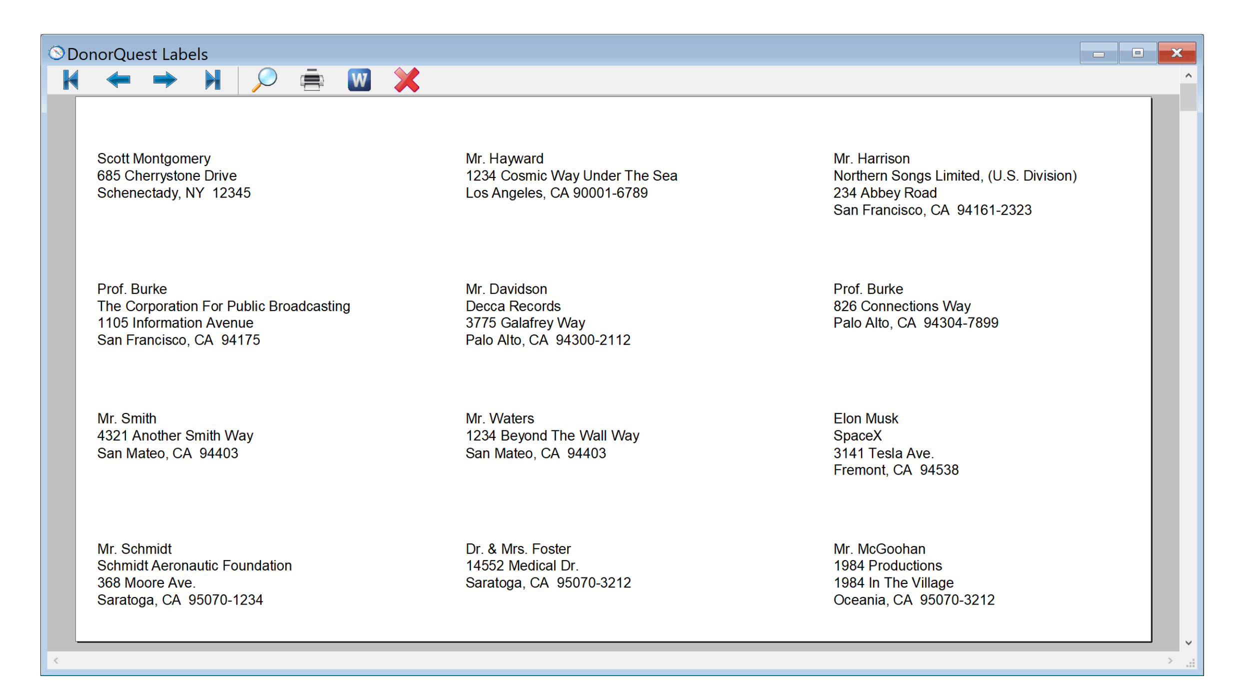
A special feature of the DonorQuest labels allows you to conditionally replace the printing of a donor's main address with one of the unlimited number of extra addresses the donor may have. For example, if some of your donors have two or more mailing addresses they move between throughout the year, you can specify the periods of time for which each address is valid. DonorQuest will then automatically substitute the appropriate extra address for each donor, based on the current date. No matter how mobile some of your donors happen to be, DonorQuest will know where to send their mail!

To print labels, first run a Selection of the donors and/or prospects you want to print labels for. Once you have a selection result to use, click on the Print Labels button of the Selection Results window. Say for example we had a selection named, "Acquisition Mailing List 1." When we click the Print Labels button, we will see the Label Print dialog open, which looks like this:



We can see that DonorQuest is making the connection between the selection we want to print and the label layout we want to use because the name of the selection will appear in the title bar of the label print dialog (shown above). In this example we are choosing the

"Avery 5160 (1" x 2 5/8") - Address Using Sal1" layout. Be sure the Printing Options are set to, "Preview And Optionally Print." This way we will be able to see a preview of the labels before actually printing them. When we click on the Run button, we should see the label preview window, which looks like this:



Most labels are designed to print in zip code order. Some, which have "(Alpha)" in their names, will print in order by Last Name instead.

9.1.1 Print Options

The Print Labels Check Box

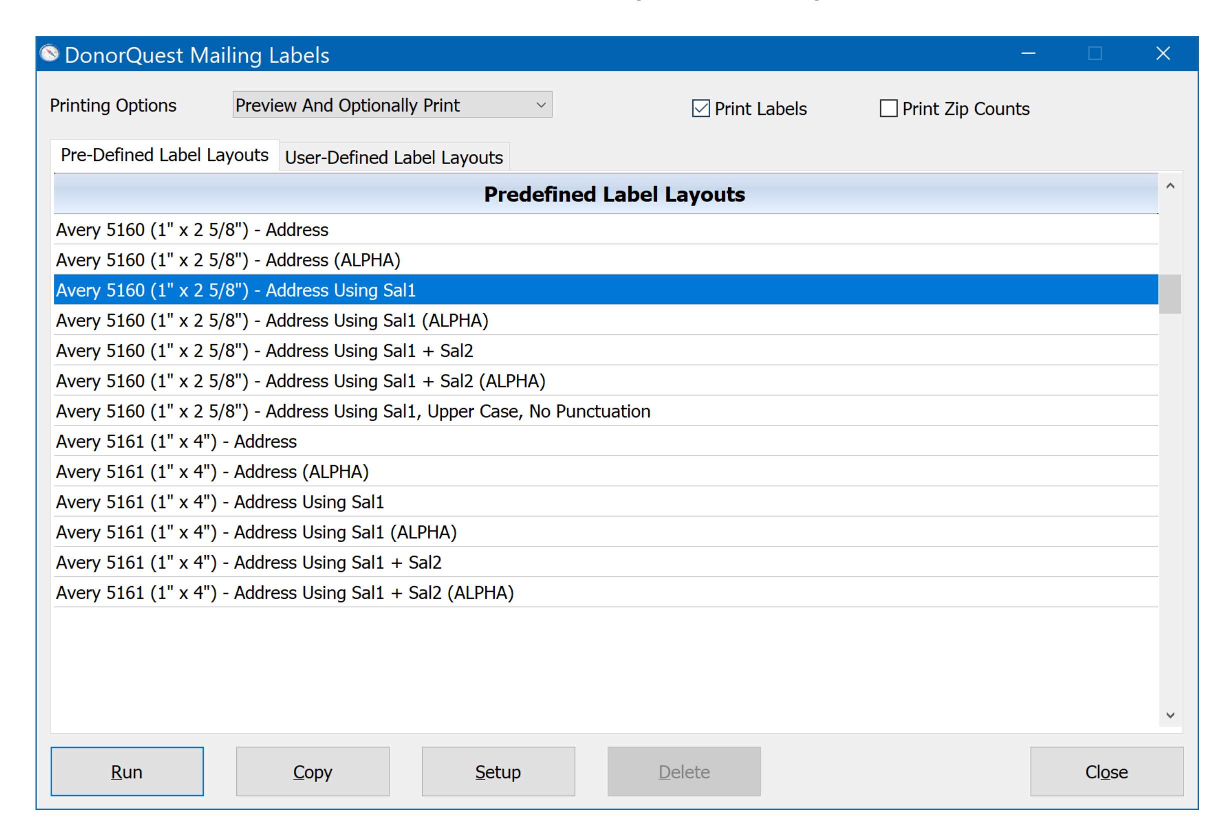
The Print Labels check box allows you to either choose whether or no to actually print labels during a run. Most of the time you will want to leave this option checked, but if you want to only print out the Zip Code Counts report you can uncheck this so that the labels will not print out.

The Print Zip Code Counts Check Box

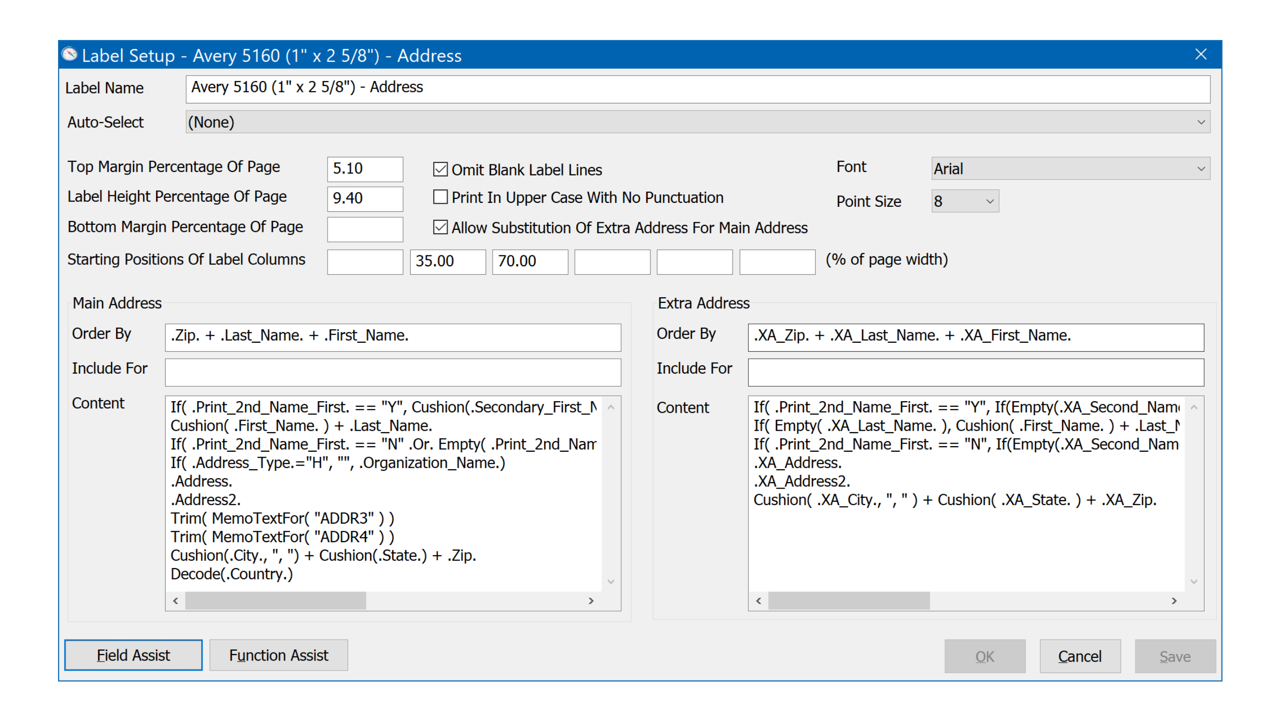
This option is only checked if you need the special bulk mailing bundle report for the Post Office. This specialized report will print a count the number of addresses in each five-digit zip code. It will then print a count of the number of addresses in each three-digit zip code that remain after forming the five-digit bundles required by the post office. Finally, it will count the number of addresses in each state that remains after forming the three-digit bundles required by the post office, allowing you to form the required state bundles.

9.2 Creating And Editing Label Layouts

To create a new label layout, you will need to first find an existing label layout that is somewhat close to what you would like to create, and use it as a starting point. As an example, let's look at the most commonly used label layout provided with DonorQuest titled, "Avery 5160 (1" x 2 5/8") - Address Using Sal1." Click on File, Print/Setup, Mailing Labels. You should see the DonorQuest Mailing Labels dialog, shown here:



This is the same label layout we previewed in the Printing Labels topic. At this point we could copy this pre-defined layout using the Copy button to begin creating our own custom version of it. But if we just want to take a look at how a label is defined without copying it, we can do this by clicking the Setup button. We will get a notice telling us this is a pre-defined layout and can not be changed. Go ahead and click OK on the message. You should then see the Label Setup dialog, which looks like this:



Label Name

This is simply the name of the label as it appears in the DonorQuest Mailing Labels dialog (shown above).

Auto-Select

The Auto-Select ties into the Pre-Defined and User-Defined selection filters in DonorQuest. These types of selection filters are self-contained, requiring no input from the user. They accomplish a specific filtering action. When you link to one of these for a label layout, the selection is automatically run prior to printing the labels, and the result of the selection is then used to print the labels.

Top Margin Percentage Of Page

Most sheets of labels have the first row of labels offset from the top of the actual page. That is, there is some space at the top of each page of labels before the first row of labels actually begins. This space is intended to compensate for the inability of most printers to begin printing at the very top of each sheet of labels. However, if there is too much blank space before the first row of labels, printing may begin too far up on the page before the first row of labels. When this is the case, the Top Margin Percentage of Page value should be set to a number large enough to allow your printer to "skip past" the blank space preceding the first row of labels. If your labels begin to low on the page, causing the text beginning to high on the first row of labels, then you should decrease this number to compensate and move the labels up on the page. Use this setting in conjunction with the Bottom Margin Percentage of Page and Label Height Percentage Of Page to align the labels correctly from top to bottom.

Label Height Percentage Of Page

The Label Height Percentage Of Page is a value that represents the vertical percentage of the page that each label requires. For example, the Avery 5160 labels supplied with DonorQuest have a Label Height Percentage Of Page of 9.40. This is because these labels are 1 inch tall and there are 10 rows of them. This means that the labels take up a total of 94 percent of the available vertical space on the page. When you combine this with the Top Margin Percentage Of Page (5.10 percent) and the Bottom Margin Percentage of Page, this adds up to 100.00 percent. Since 10 label rows add up to 94 percent of the page height, a single label takes up 9.40 percent of the page. Only one number is needed for the label height, because all 10 labels are a uniform height.

Bottom Margin Percentage Of Page

Some sheets of labels have the last row of labels offset from the bottom of the page. That is, there is some space at the bottom of each page of labels after the last row of labels ends. This space is intended to compensate for the inability of most printers to print to the very bottom of each sheet of labels. However, if there is not enough blank space allotted after the last row of labels, printing may actually end after the last row of labels. When this is the case, the Bottom Margin Percentage of Page value should be set to a number large enough to allow your printer to "push up" the labels on the page. If your labels end to high, with the information beginning before the last row of labels, then you might decrease this number to compensate and move the labels down on the page. Use this setting in conjunction with the Top Margin Percentage of Page and Label Height Percentage Of Page to align the labels correctly from top to bottom.

Starting Positions Of Label Columns

DonorQuest can support anywhere from one to six-across labels. The six starting position values specify at what position (in percent of page from left to right) each label column begins. You can see above that the Avery 5160 labels supplied with DonorQuest are three-across, with the first column of labels starting right at the left margin (with no starting position specified), and the second and third columns starting at 35% and 70% from the left, respectively. Since there is no fourth, fifth, and sixth starting positions, DonorQuest knows these are three-across labels.

Omit Blank Label Lines

During the course of printing, a donor may be encountered who has absolutely no data in the particular field or fields that comprise one or more lines of the mailing label. This results in a blank line being left on the mailing label. An example would be those donors who have nothing in the Address2 field. If the Omit Blank Data Lines check box is on then such blank lines will be omitted, and there will be no gaps in the printed label. This checkbox should normally be set on.

Print In Upper Case With No Punctuation

If printing labels for a mailing, the Post Office prefers all addresses to be in upper case with no punctuation to make it easier for their automated systems to read the labels. However, labels printed this way do not look as nice for obvious reasons. This checkbox provides an easy way to comply with the Post Office's preference, without having to store the addresses in upper case in the actual database, so that the mixed case version of

addresses are still available for form letters and such.

Allow Substitution Of Extra Address For Main Address

In DonorQuest, each donor has one main address, and any number of extra addresses. One or more of these extra addresses may be triggered to print based on both the date range set in the extra address itself, and additionally by any condition set in the Extra Address Include For expression. If one of a donor's extra addresses prints, you would normally want to prevent the donor's main address from printing. If the Allow Substitution Of Extra Address For Main Address option is turned on, then if any extra address for the donor prints, the donor's main address will not print. The labels that are supplied with DonorQuest are shipped with this option turned on.

Font

This is the font for the label layout. All labels will be printed using this font when the layout is used.

Point Size

This is the point size for the font of the label layout. All labels will be printed using this point size when the layout is used.

9.2.1 Main Address Block

The Main Address Block defines how a main address is to be used when forming a label.

Order By

This defines the data to be alphabetical ordered by when a label is drawn from the Main Address fields. Typically, this is last name within zip code, though it may be any field or field expression. The DonorQuest pre-defined labels are typically ordered by last name within zip, so when copying and modifying a pre-defined label for your own use, you should only have to alter this expression in the rare instance that you wish to alphabetize mailing labels on something other than zip code and name. The Order By expression may apply functions to fields to achieve very special sort orders. Functions can be particularly useful when you want to alphabetize the labels on a transformed version of the data within a field or fields. For example, the Descend() function will transform the data of a field such that the labels will be alphabetized in descending order by the field to which you apply the Descend() function.

Include For

For specific custom label layouts, you may wish to only include the main address of donors who meet a certain condition. This condition must be in the form of an expression that is either true or false. For example, to only print a mailing label for those donors who have a "Y" entered for their Newsletter field, you would enter the following expression:

.NewsLetter. = "Y"

The expression you enter for the Main Address Include For option has no effect on the inclusion of extra addresses, since there is a separate expression for that. If you wish to unconditionally include the main address for donors while printing mailing labels (the normal case), simply leave this option blank. Note that in most cases the selection you use to print labels with will limit the main addresses which print. This is just a way to enforce an additional filter condition within the label definition.

Content

This is quite simply what is printed on each line of the label. Each line of the content section corresponds to a printed line on the label. A line of content may be a single field, or a combination of fields. For example, the pre-defined label layout, "Avery 5160 (1" x 2 5/8") - Address Using Sal1" included with DonorQuest has the following content:

```
.Salutation1.
If( .Address_Type.="H", "", .Organization_Name.)
.Address.
.Address2.
Trim( MemoTextFor( "ADDR3" ) )
Trim( MemoTextFor( "ADDR4" ) )
.City. + ", " + .State. + " " + .Zip.
Decode(.Country.)
```

As you can see, some of the label lines are simply single fields by themselves, such as the first line which prints the content of the Salutation1 field directly. But other label lines are based on expressions involving fields. Also, some of the content is conditional, meaning it will not always contribute to a line on the label. For example the second line will only print the Organization Name if the Address Type of the main address is not "H" for home. And the fifth and sixth lines involve searching memo history for each donor for any memo's coded as ADDR3 or ADDR4, and only pulling the text of those memos in the label if the memos exist for a given donor. Since we have the Omit Blank Data Lines option turned on, any expression which evaluates to a blank line will not actually print, so our resulting labels will not have any empty lines. So, having eight lines in our content section does not mean the label needs to accommodate eight lines, since some of them will not print.

9.2.2 Extra Address Block

The Extra Address Block defines how an extra address is to be used when forming a label. The options here are the same as those of the Main Address Block.

Order By

This defines the data to be alphabetical ordered by when a label is drawn from the Extra Address fields. Typically, this is last name within zip code, though it may be any Extra Address field or field expression. The DonorQuest pre-defined labels are typically ordered by last name within zip, so when copying and modifying a pre-defined label for your own use, you should only have to alter this expression in the rare instance that you wish to

alphabetize mailing labels on something other than zip code.

Include For

DonorQuest will always require that the Start and End dates for an Extra Address record be met before the Extra Address is further considered for inclusion. If an Extra Address passes the date range check, then the Include For expression comes into play and must also be true for an Extra Address to be included. For specific custom label layouts, you may wish to only include the extra addresses which meet a certain condition. This condition must be in the form of an expression that is either true or false. For example, to only print a mailing label for extra addresses which have the code "SUMR" (for Summer home), you would enter the following expression:

```
.XA_Code. = "SUMR"
```

If you do not wish to have restrictions beyond the automatic date filtering for Extra Addresses, simply leave this option blank. This is just a way to specify an additional filter restriction Extra Address records must pass to be included in a label print job. All Extra Addresses are subject to the date range filter before they even get this far. If there is not a valid start and end date for a given extra address, then the Include For condition does not matter, as the extra address would have already been disqualified for printing.

Content

This is quite simply what is printed on each line of the label when an Extra Address record is included. Each line of the content section corresponds to a printed line on the label. A line of content may be a single field, or a combination of fields. For example, the pre-defined label layout, "Avery 5160 (1" x 2 5/8") - Address Using Sal1" included with DonorQuest has the following content for Extra Addresses:

```
If( Empty(.XA_Salutation.), .Salutation1., .XA_Salutation. )
.XA_Address.
.XA_Address2.
Cushion( .XA_City., ", " ) + Cushion( .XA_State. ) + .XA_Zip.
```

As you can see, some of the label lines are simply single fields by themselves, such as the second and third lines. But other label lines are based on expressions involving multiple fields. Also, some of the content is conditional, meaning it will not always contribute to a line on the label. Since we have the Omit Blank Data Lines option turned on, any expression which evaluates to a blank line will not actually print, so our resulting labels will not have any empty lines.

Topic X

10 Graphs

Reports, Graphs

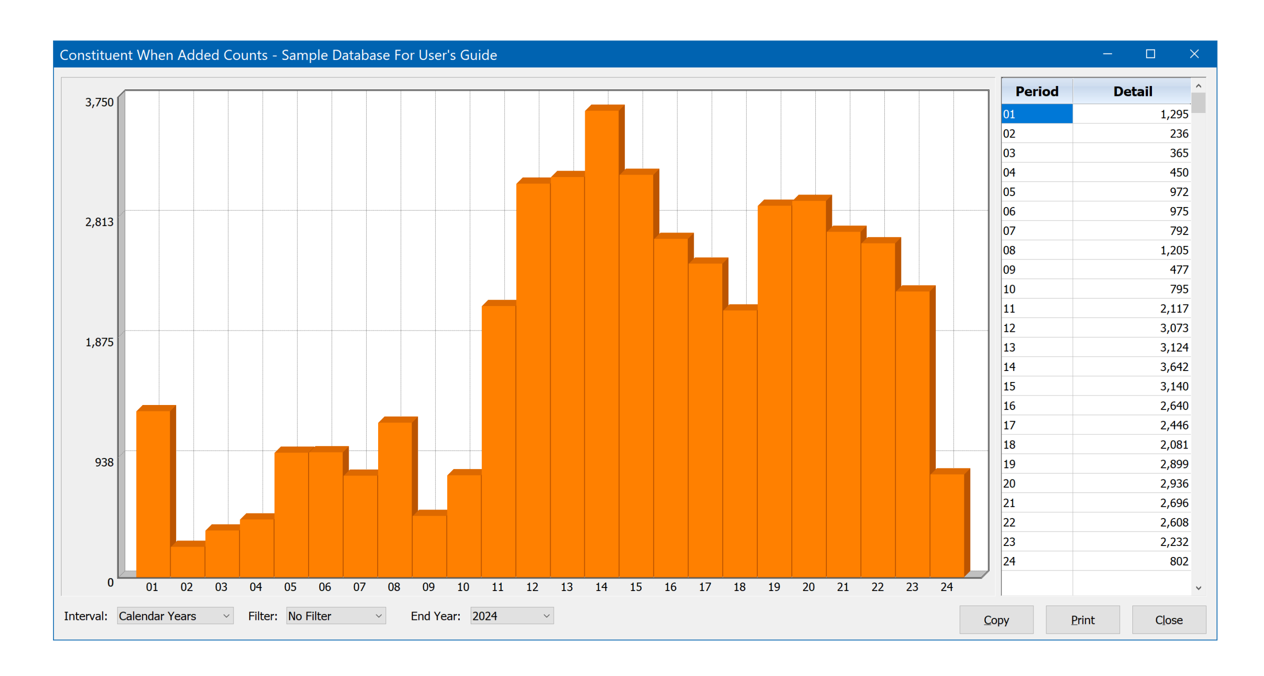
DonorQuest includes many graphs to help you visualize your data. You can graph counts of new Constituent and Memo additions over time, plus detailed count and dollar information for Donations, Pledges, and the grant metrics of Contacts. These graphs are available both on the Reports menu, and when the Selection Results window is open. If you wish the graphs to operate on all Constituents, Memos, Donations, Pledges, and Contacts, then launch them from the Reports menu. However, if you wish to graph only the records of a particular Selection Result, start by opening the Selection Results window, highlight the selection you wish to graph, then click the Graph button you will see on the left side of the Selection Results window. The graphs are particularly flexible when used with a Selection Result, as this allows you to apply any conceivable filter condition to the data being graphed. For example, you could graph just the donations for a specific campaign by first running a selection to capture those specific donations.

Counts in graphs are shown in amber, and dollar totals in green. Some graphs, like the Constituency Counts graph (shown below), can only display counts, so the bars are always amber. Other graphs (such as the Donations graph) have a checkbox for toggling between totals (shown in green), and counts. Each graph also contains two display components - the actual graph, and a grid with the raw numbers from which the graph is drawn.

All graphs also provide interactive controls which allow you to customize the graph content for specific time spans and intervals within each time span. You can also apply some basic filters to the data. While some graphs have controls which are specific to them, all graphs will have Interval, Filter, and End Year options. All graphs will also have Copy and Print buttons. The Copy button will copy the graph to your computer's clipboard, so that you may paste it into a document. The Print button will simply print the graph to the printer you choose.

Constituent Counts

Choosing Reports, Graphs, Constituent Counts will display the Constituent Counts graph. This graph simply counts the number of new constituents added to your database at specific time intervals. Here's what this graph would look like for a typical nonprofit organization adding a few thousands constituents per year:



Interval

The default interval for the Constituent Counts graph is calendar years, spanning 24 years, ending in the current calendar year (shown above). Clicking on the drop-down list for the Interval control will reveal the other intervals available, specifically Fiscal Years, Months, Weeks, and Days. Note that the fiscal years displayed are based on the fiscal year settings you have specified for your organization under Configure, Program Settings. Be sure the correct starting month and current fiscal year are set there.

Filter

By default there is no filter applied to the data in the graph. Clicking on the drop-down list for the Filter control will reveal all available filters, which include Year-To-Date, specific Quarters, or a particular Month. These filters are only available when the Interval is set to calendar or fiscal years. The Year-To-Date filter will include only data which was added up to the current point in time for each year. For example, if today is March 15th, then all years will be filtered such that only data between the start of each year and March 15th of each year is shown. Likewise, choosing a specific quarter (1..4) from the drop-down list for the filter control will allow you to see only data from each year for the specific quarter chosen. This allows you to compare a specific quarter across all the years shown. Lastly, choosing a specific month from the drop-down list for the filter control will allow you to compare data from a specific month across the years.

End Year

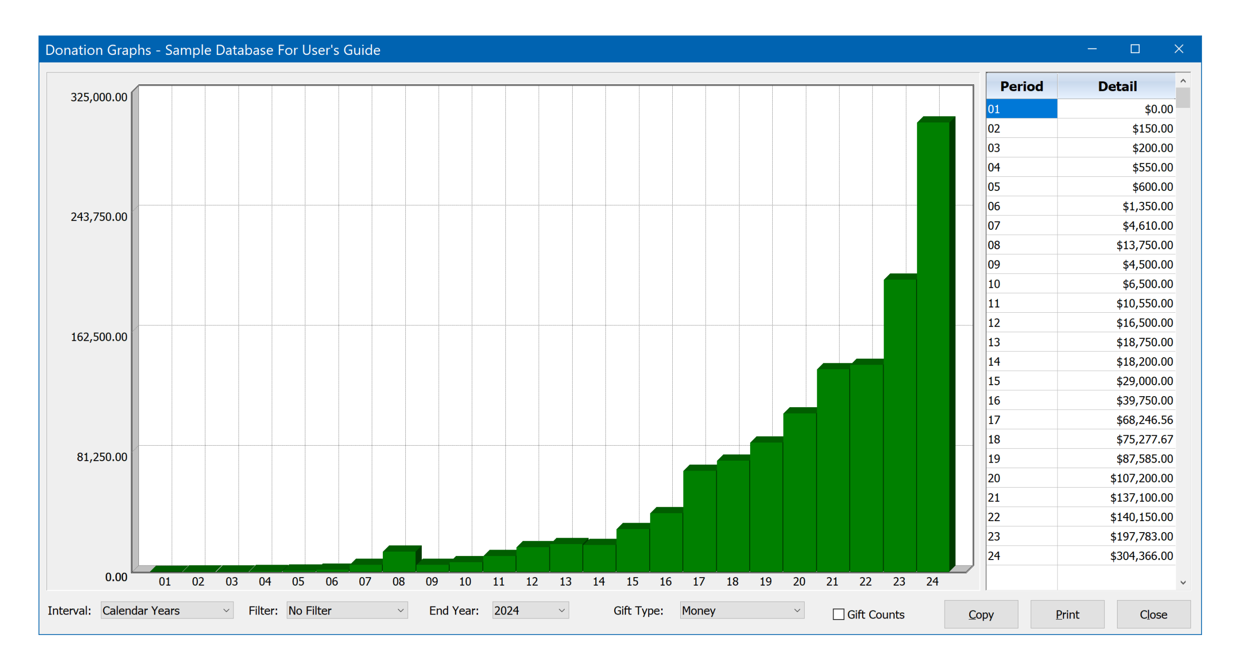
By default the end year for each graph when you first open it is the current year. This allows you to see back 24 years. However, you may go back even further in time if need be by setting an ending year which is further in the past. If the Interval is set to months, this setting becomes more important as only the past 24 months are shown from a specific ending year, and you may wish you review 24-month spans further back in time.

End Date

While the End Date control is not displayed initially, the End Year control will magically change to be an Ending Date if the Interval is set to Weeks or Days. This allows you to set a specific end point for a week or day graph, down to an exact day.

Donation Graphs

Choosing Reports, Graphs, Donation Graphs will open with the standard year-based Donation revenue graph, which looks like this:



As with all graphs, the Donation Graphs provide Interval, Filter, and End Year / End Date controls (described above). When first opened, the graph will show the default display of a 24-year time span, with total revenue broken down by calendar years. You can change the interval to be fiscal years, months, weeks, or days. When viewing a year or month interval, the ending year of the graph may be set to any year you wish. For example, if you set the ending year to 2008, and keep the interval at calendar years, the graph would cover the years 1984-2008. If the interval is set to weeks or days, you can set an exact ending date.

The donation graphs may also be driven by a donation-based selection result. This allows you to filter the donations included by any conceivable condition or set of conditions. To graph a donation-based selection result (one built from the donations table), open the Selection Results window, highlight the donation result you wish to graph, then click on Selections, Donation Graphs From. Alternatively you may also simply click on the Graph button on the left side of the Selection Results window.

Gift Type

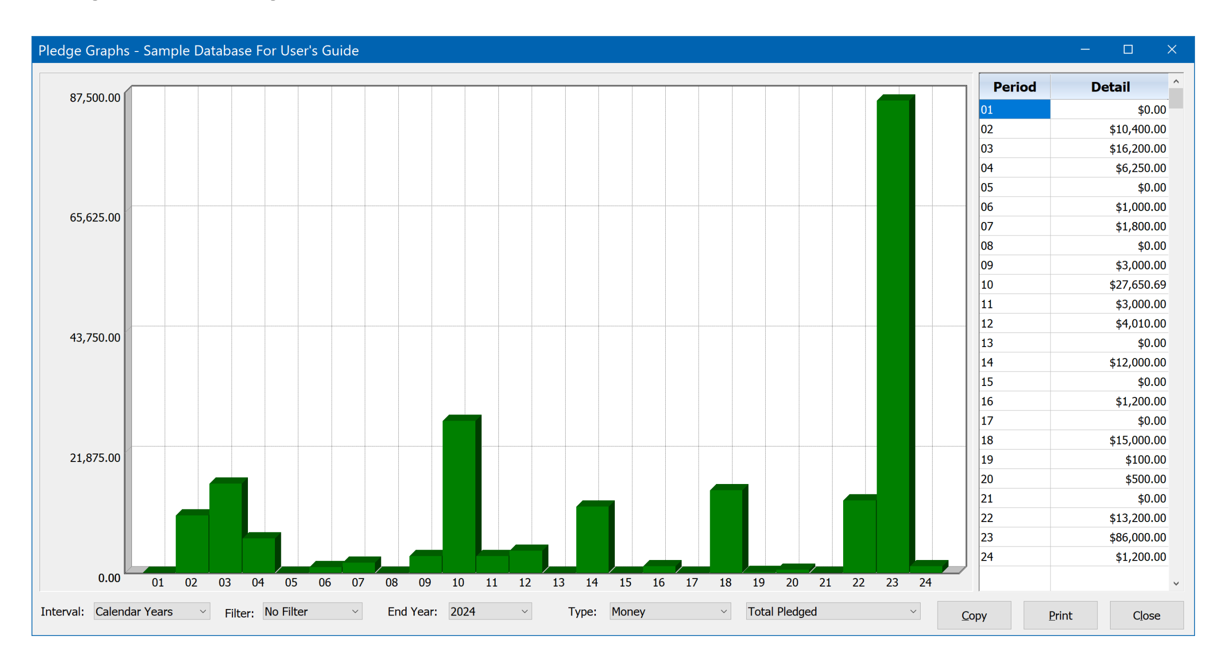
In addition to monetary totals, using the Gift Type control you may also choose from any Alternate Unit donation types your organization may have created. Alternate Unit donations are non-monetary. Typical Alternate Unit types of donations would include hours of time for volunteers, pounds of food, etc. New Alternate Unit types can be defined as needed under Configure, Program Settings.

Gift Counts

Finally, you also have the option of graphing gift counts instead of amount totals. This is done by checking the box labeled, "Gift Counts." You may toggle back and forth between the gift total and gift count graphs to see the relationship between the two. This can be very revealing. For example, you may find that in some years, while the total revenue was about the same, one year saw a much larger number of gifts going into making the total. That will tell you that for that year, your campaign efforts may have brought in more gifts, but not really anymore revenue. So you would then want to review the campaigns you ran in the lower gift count (but equal revenue) years. Since the revenue was the same, that will tell you that the campaigning for the lower gift count year was actually reaching more affluent donors, and perhaps you should refocus your efforts there again, since a gift count boost there would be far more valuable.

Pledge Graphs

Choosing Reports, Graphs, Pledge Graphs will open with the standard year-based Pledged amounts graph, which looks like this:



As with all graphs, the Pledge Graphs provide Interval, Filter, and End Year / End Date controls (described above under the Constituent Counts graph). When first opened, the graph will show the default display of a 24-year time span, with total pledged amounts broken down by calendar years. You can change the interval to be fiscal years, months,

weeks, or days. When viewing a year or month interval, the ending year of the graph may be set to any year you wish. For example, if you set the ending year to 2008, and keep the interval at calendar years, the graph would cover the years 1984-2008. If the interval is set to weeks or days, you can set an exact ending date.

The pledge graphs may also be driven by a pledge-based selection result. This allows you to filter the pledges included by any conceivable condition or set of conditions. To graph a pledge-based selection result (one built from the pledges table), open the Selection Results window, highlight the pledge-based result you wish to graph, then click on Selections, Pledge Graphs From. Alternatively you may also simply click on the Graph button on the left side of the Selection Results window.

Type

In addition to monetary totals, using the Type control you may also choose from any Alternate Unit types your organization may have created. Alternate Unit donations and pledges are non-monetary. Typical Alternate Unit types of pledges would include hours of time promised from volunteers, pounds of food promised from food processing centers, etc. New Alternate Unit types can be defined as needed under Configure, Program Settings. Donations and Pledges share the same list of defined Alternate Unit Types. The Type filter also has a second drop-down which allows the following additional filters and focus values:

Total Pledged

This is the default when the pledge graph is first opened. It directs the graph to focus on the Pledge Amount field as the subject of the graph. So total amount pledged in each interval is represented in the vertical bars of the graph. Pledges are assigned to Intervals based on their Start Date.

Total Paid

Choosing the Total Paid option directs the graph to focus on how much of each pledge has been paid to date, for pledges with a Start Date in the selected Interval. This total will lag behind the Total Pledged as pledges mature to their full term, but will eventually catch up as time goes by. Note that this is the total paid to date - not the total paid in each time interval (use the Interval Payments Received option instead if that is what you want to see). The Total Paid graph is meant to be compared with the Total Pledged graph to see how much has been paid on the very same pledges which were placed in a specific interval on the Total Pledged graph based on the Start Date for each pledge.

Remaining Balance

Choosing the Remaining Balance option directs the graph to focus on how much of each pledge remains to be paid to date, for pledges with a Start Date in the selected Interval. This total will approach zero as pledges mature to their full term. Note that this is the remaining balance to date - not the remaining balance in each time interval. It is meant to be compared with the Total Pledged graph to see how much has yet to be paid on the very same pledges which were placed in specific intervals on the Total Pledged graph based on the Start Date for each pledge.

Interval Payments Expected

Choosing the Interval Payments Expected option will show how much revenue is expected in total for all pledges in each Interval, based on the payment schedule for each pledge. Pledges are assigned to Intervals based on their Start Date.

Interval Payments Received

Choosing the Interval Payments Received option will show how much revenue was actually received in total for all pledges, but just within each Interval. Pledges are assigned to Intervals based on their Start Date. Comparing this against the Interval Payments Expected graph will reveal how behind in payments your donors were in total for each Interval, though some may have, "caught up" on payments in later intervals. This does not show total payments to date - use the Total Paid option for this.

IPE Counts

Interval Payments Expected Counts. This simply displays a count of the number of pledges with payments expected in each Interval.

IPR Counts

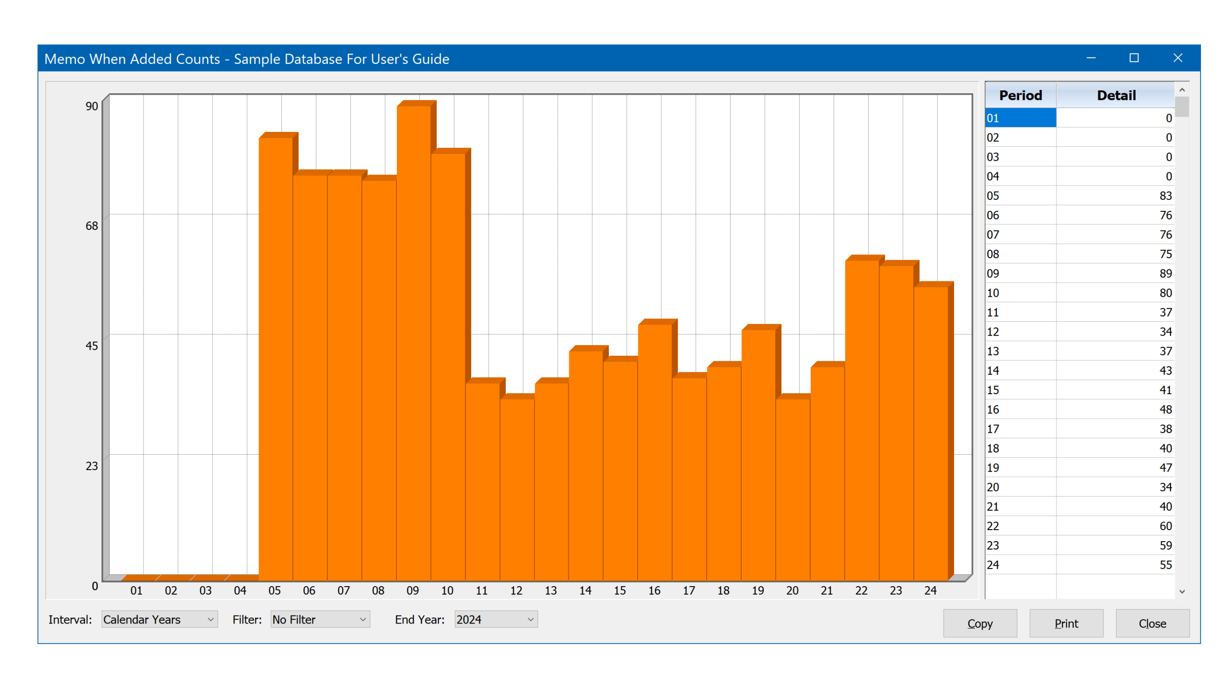
Interval Payments Received Counts. This simply displays a count of the number of pledges with payments actually received in each Interval.

Pledge Counts

This is simply a count of the number of pledges with a Start Date in each Interval.

Memo Counts

Choosing Reports, Graphs, Memo Graphs will open with the Memo When Added Counts graph, which looks like this:



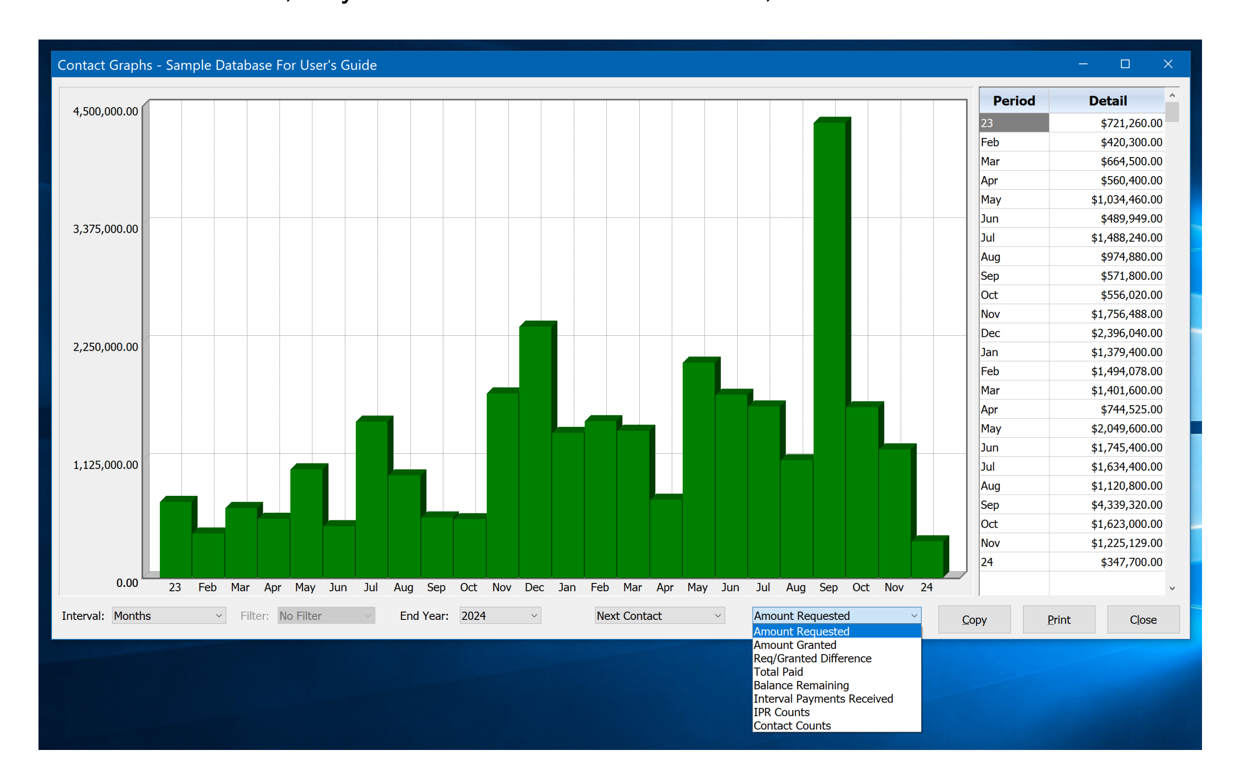
As with all graphs, the Memo When Added Graphs provide Interval, Filter, and End Year / End Date controls (described above under Constituent Counts graph). When first opened, the graph will show the default display of a 24-year time span, with total memo added counts broken down by calendar years. You can change the interval to be calendar years, fiscal years, months, weeks, or days. When viewing a year or month interval, the ending year of the graph may be set to any year you wish. If the interval is set to weeks or days, you can set an exact ending date. Memos are convenient for making short notes about key interests or attributes of a donor’s profile. As with donations and pledges, each donor may have an unlimited number of memos. The above example graph is from a sample database with a small number of donors. In practice, the memo's added each year would be in the thousands, depending on how many donor's (constituents) an organization has, and how extensively they are using the memo feature. The main purpose of this graph is simply to give you a visual representation of how extensively your organization is using the Memo feature. However, if your organization is using the Memos feature to track things such as which solicitations each donor has received, then when combined with a memo-based selection result, this graph will then reveal your solicitation volume over time. For more information on Memos, please refer to the Quick Start Guide topic here, and the Entering Information topic here.

The Memo Counts graphs may also be driven by a memo-based selection result. This allows you to filter the memos included by any conceivable condition or set of conditions. To graph a memo-based selection result (one built from the memos table), open the Selection Results window, highlight the memo result you wish to graph, then click on Selections, Memo Graphs From. Alternatively you may also simply click on the Graph button on the left side of the Selection Results window.

Scheduled Contact Graphs

Choosing Reports, Graphs, Scheduled Contact Graphs will open with the standard year-

based Scheduled Contacts graph. Typically, you will be interested in seeing more recent contact information, so you will set the Interval to Months, which looks like this:



As with all graphs, the Contact Graphs provide Interval, Filter, and End Year / End Date controls (described further above under the Constituent Counts graph topic). The Contacts Graphs mostly focus on the Grant Management feature of Contacts. When first opened, the graph will show the default display of a 24-year time span for when grant requests have been made, with the total grant amount requested segmented by calendar years and displayed in the height of the bars. The above example focuses on the total amount of grant requests by month, over the past 24 months.

Grants are large donations typically made by corporations and foundations. But they usually take some work to get -- and a lot of follow-up with corporate and foundation contacts. That's why Grant Management fields are a perfect fit for the contact manager in DonorQuest. The contact manager has a group of fields specifically dedicated to acquiring and fulfilling a grant. For more background information on the DonorQuest Contact Manager in general, and the Grant Management Component in particular, please refer to the contact topics in the Quick Start Guide here, and the Entering Information topic here.

In addition to the basic Interval, Filter, and End Year / End Date controls, the Contact Graphs have two additional controls for choosing which date field of a contact record is used on the time axis, and which amount field is used to set the height of the bars. The available contact date fields you may choose from for the time axis are Last Contact, Next Contact, Request Made, Request Acknowledged, Decision Made, First Payment, and When Added. The available contact amount fields you may choose from for building the height of the bars are Amount Requested, Amount Granted, Requested/Granted Difference, Total Paid, Balance Remaining, Interval Payments Received, Interval Payments Received Counts, and Contact Counts. Following is a brief description of each

of these options:

Last Contact

This is the date when the user assigned to the contact last interacted with the donor regarding the contact. Since there may be several interactions with a donor regarding a specific contact before the contact is finally closed, both this date and the Next Contact date (described below) may be reset several times. The last contact date shows at a glance how long it has been since the donor was last contacted concerning the specific issue for which the contact was created.

Next Contact

This is the trigger date for the next action to be taken with the contact. When the user designated for a specific contact logs into DonorQuest on or after this date, the contact will be included in the reminder which shows the user how many open contacts they now have that have come due for action. The login reminder will continue to include a contact until the contact is closed, or the contact date is changed to again be in the future.

Request Made

This is the date that the corporation or foundation from which you are seeking a grant was first contacted by your organization with a grant proposal.

Request Acknowledged

This is the date the corporation or foundation from which you are seeking a grant first responded to your request.

Decision Made

This is the date the corporation or foundation from which you are seeking a grant made a decision regarding the grant.

First Payment

When a grant is given, this is the date when the first grant payment is expected.

When Added

The date the contact record was created.

Amount Requested

This is the amount you are asking for in the grant.

Amount Granted

This is the amount the corporation or foundation decided to fund.

Requested/Granted Difference

This is a computed value equal to the grant amount requested, minus the amount granted. When graphing this, you want to see the values on the vertical graph axis be very small, meaning your organization is getting most or all of the amounts they are asking for in grants. Further, if this graph is consistently minimal or even zero across the board, you might consider increasing the asking amounts for your grant requests.

Total Paid

This is a running total which DonorQuest will automatically update for you. Sometimes grants will be funded in one lump sum, other times they will be funded in payments over time. In both cases, grant revenue should be recorded as donations in DonorQuest. A connection is made between donations and grants via the Donation Stimulus and Grant Donation Payment link fields, which share the same drop-down list of Stimulus codes. Graphing this value will show you total revenues from all your grants in the time Interval you have chosen. Note that all payments to each grant are included, regardless of when they were made. So it's a total paid-to-date for each grant, no matter where on the timeline the grant itself was created.

Balance Remaining

This will produce a graph of the difference between the amounts granted and what has been paid so far in the chosen time interval. Extending the time interval well into the past will allow you to easily spot if there are any grants which were not paid completely.

Interval Payments Received

This is a total of the payments for each grant received within each time interval. For example, if you have chosen years for the time interval, the vertical bar for each year would represent the total payments to each grant for just that year. This is different than the Total Paid option, which graphs the total of all payments to date for each grant.

Interval Payments Received Counts

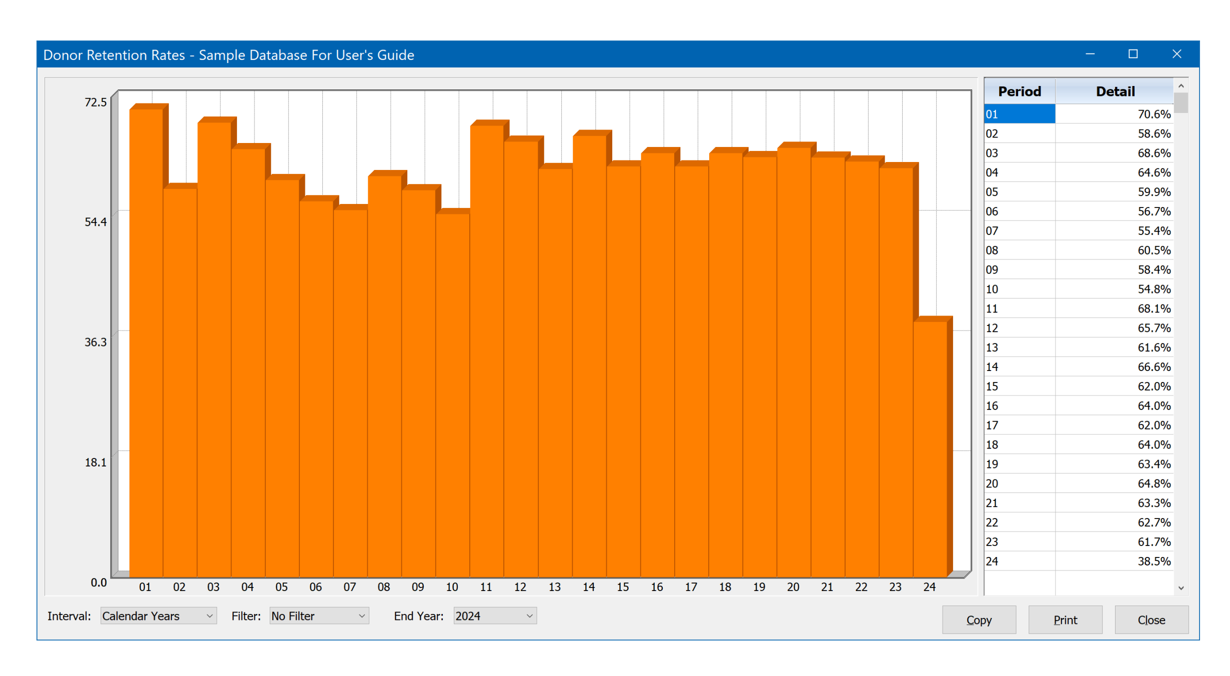
This is a count of the payments for each grant received within each time interval. For example, if you have chosen years for the time interval, the vertical bar for each year would represent a count of the total payments to each grant for just that year.

Contact Counts

This is just a simple count of the number of contacts in each segment of the time interval you have chosen to graph.

Donor Retention Graphs

Choosing Reports, Graphs, Donor Retention Graphs will open the Donor retention graph, which looks like this:



The Donor Retention graph allow you to visually access your donor retention rates over time, usually from year-to-year. A retained donor is someone who gave in two consecutive intervals on the chosen timeline. Most nonprofit organizations average a yearly retention rate of about 45 percent. As with all graphs, the Donor Retention Rates graph provides Interval, Filter, and End Year controls (described further above under the Constituent Counts graph topic). However, intervals for this graph are limited to Calendar Years, Fiscal Years, and Months.

Topic XI

11 General Ledger Process

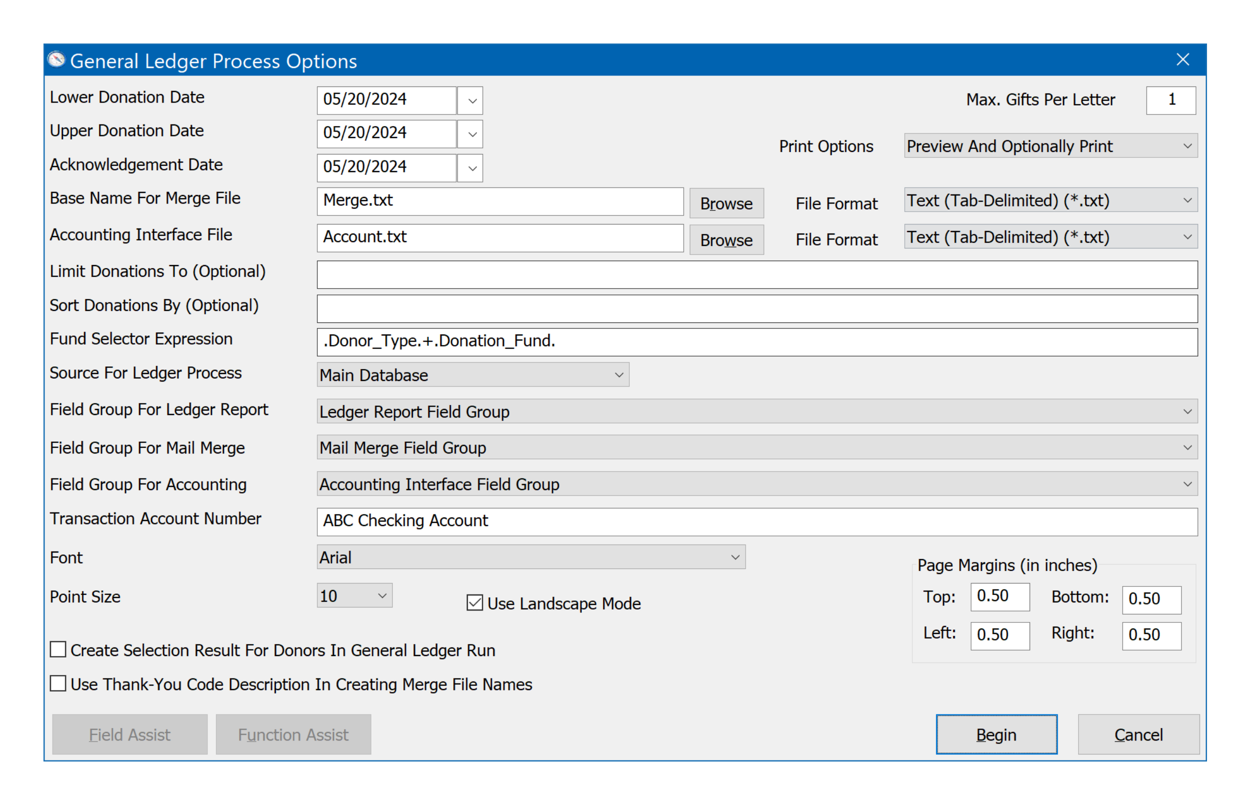
The General Ledger Process is designed to provide a summary of the day's donation entries, and to automate your acknowledgement letter process. This summary consists of a printed report, as well as one or more merge files intended for use with your word processor. The printed report can be used by your accounting department to balance general ledger totals in their software against the total dollar amounts entered into DonorQuest. The mail merge file allows your word processor to generate thank-you letters for each of the donors for which a donation was entered. In addition, since separate mail merge files are created based on the code entered for the TY (thank-you) field of each donation, it is possible for your word processor to generate different letters, depending on the nature of the gift.

By default, the "Subtotals By Fund" segment of the General Ledger process uses the donation fund field to summarize donations by fund. If you wish to base the "Subtotals By Fund" segment on another donation field (such as a part of the donation account number), it is possible to do so.

Though the General Ledger Report feature is meant to present an accounting of incoming donations on a daily basis, it can be used to summarize donations received for any span of time. For example, if you needed an accounting breakdown of revenues for the month of December 2018, you would simply specify a date range of "12/01/2018" to "12/31/2018" when running the process.

11.1 Running the General Ledger Process

To run the General Ledger Process, click on File, Run The General Ledger Process. This will open the General Ledger Process Options window, which looks like this:



Following is a description of the General Ledger options:

Lower/Upper Donation Date

The date range you specify will limit the ledger process to only those donations that fall within the specific date range.

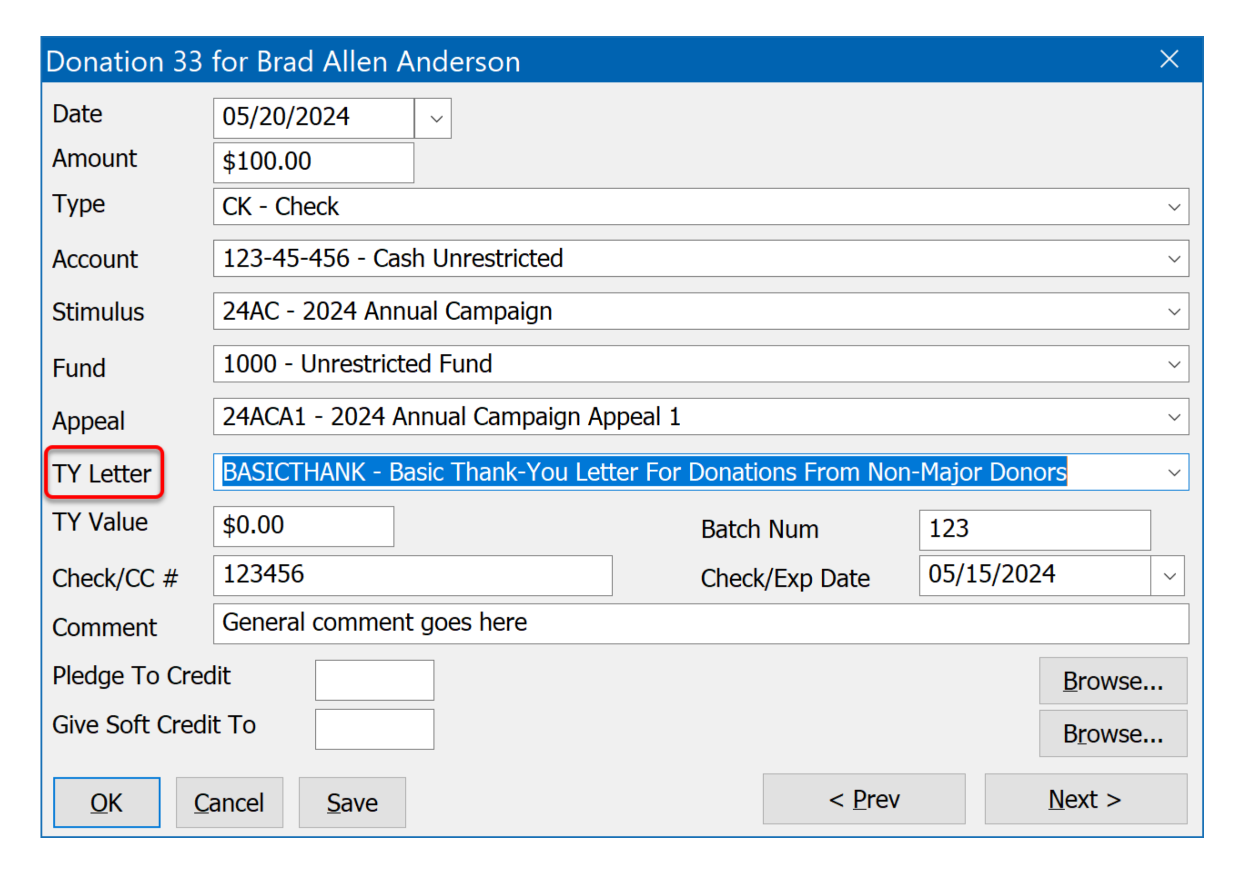
Acknowledgement Date

The Acknowledgement Date here corresponds to the Donation When Acknowledged date each donation has, which is used to track the date an acknowledgement was sent to the donor. Entering a date here will set the Acknowledgement date for all the donations processed to the date you specify. Normally it is the current date, and that is the default entered for you here when the General Ledger Process Option dialog first opens. If you would like to run the General Ledger Process without setting the acknowledgement date for each donation processed, leave this field blank (for example, if you are re-running a General Ledger from the past just to get the printed report portion and you don't want to reset the When Acknowledged dates in the donation history).

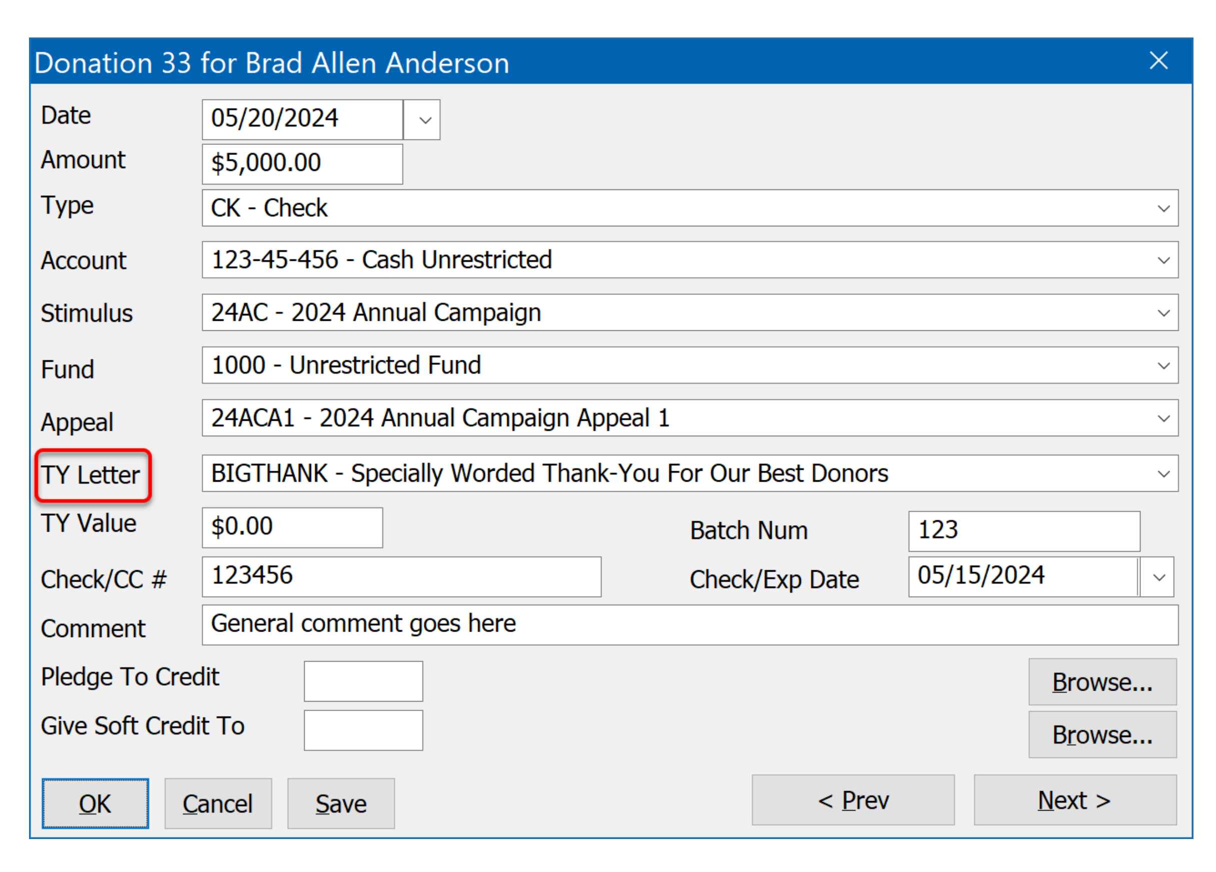
Base Name For Merge File

When the General Ledger process is run, it automatically creates one or more mail merge files in the \DQuest\Output\ folder (though you can set this to any folder you wish in the Base Name For Merge File setting). These mail merge files are for the donations entered during the time period specified for the Lower/Upper Date (usually for the current day). The name of all merge files created will start with the base name you enter in the Base Name For Merge File setting, plus a code or description to indicate which acknowledgement letter the donations in each merge file belong to. This code or description comes from the

Donation TY Letter Code field of each donation (shown below with a red box around it). The normal base file name is Merge.txt (though you may set it to a different name if you wish). So, if Merge.txt is the base file name, and you have a batch of donations with BASICTHANK in the Donation TY Letter Code field, then MergeBASICTHANK.txt will be the actual name of the mail merge file which will contain these donations. The Donation TY Letter Code for each donation is specified here in the donation form:



Your organization may have just one general thank-you letter you use, or you may have several letters on tap to use depending on the type of gift or donor. Using the above example, let's say your organization has a second thank-you letter you use for major donors, and you have coded it in the Donation TY Letter Code as BIGTHANK, like this:



And let's say you entered a batch of 100 donations, 20 of which were coded for the BIGTHANK letter, with the remaining 80 coded for the BASICTHANK letter. When you run the General Ledger Process for your batch, you will wind up with two merge files, ready to go:

MergeBASICTHANK.txt
MergeBIGTHANK.txt

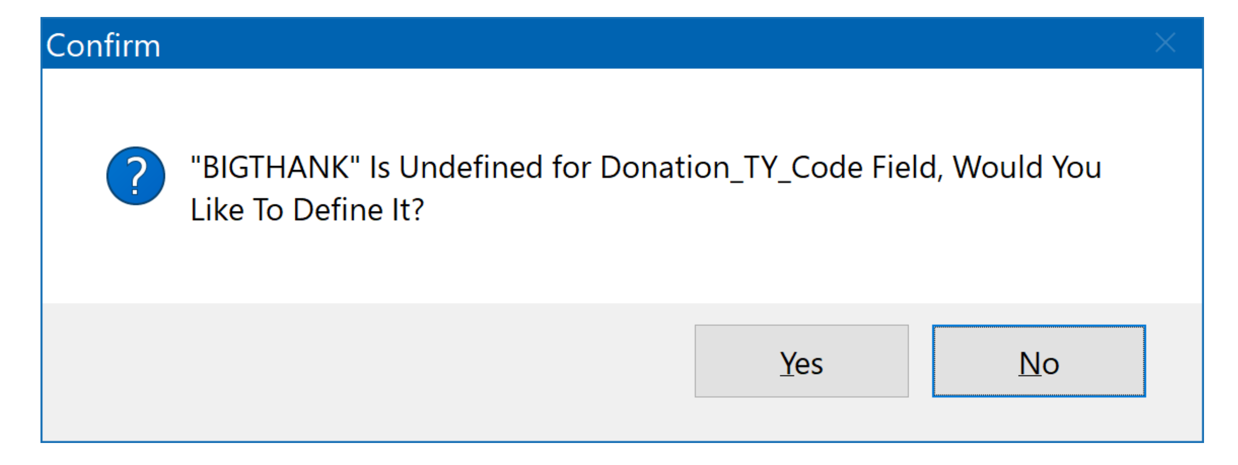
Note that these are merge data files, containing the name/address/donation information for the donors who need to be acknowledged. These two merge files need to be paired with corresponding Word document files, which contain the actual text and layout of the two form letters. To keep things consistent, you should use the same file names for your form letter documents in Word. So, for this example, you should have two Word document files named:

MergeBASICTHANK.docx
MergeBIGTHANK.docx

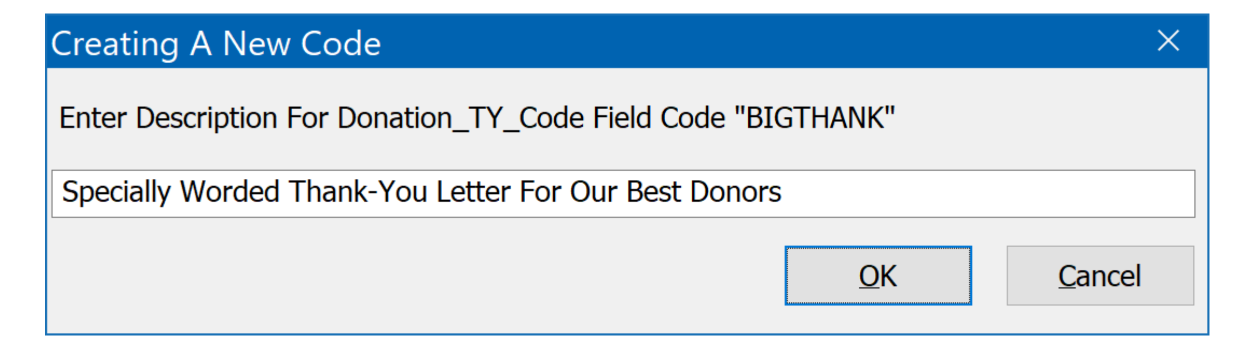
Once you tell Word that MergeBIGTHANK.docx is paired with MergeBIGTHANK.txt, all you will need to do on a regular basis after you run the General Ledger process in DonorQuest is open MergeBIGTHANK.docx in Word, and Word will automatically open the companion file MergeBIGTHANK.txt to fetch the name/address/donation information for that letter, and you're ready to immediately print your letters. The same goes for the MergeBASICTHANK file pair, and any others you may have.

How you create each form letter and link it to the corresponding data file depends on the word processing software you use. Let's do an example in Word. Note that the steps you are about to see are a one-time setup you perform for each form letter you have. You only have to do these steps once for each letter. After that, Word will remember everything for each letter, including where to go to get the new donor name/address info and donations for each batch. So on a regular basis, your acknowledgement letter printing routine will simply consist of running the General Ledger Process in DonorQuest, then opening each Word doc you have donations for, clicking merge and print.

For our example, first enter a donation like the one above in DonorQuest with the BIGTHANK gift code. When you type BIGTHANK in the Thank-You Letter Code for the new gift for the first time and press the Tab key, DonorQuest will ask you if you would like to create the BIGTHANK code like this:

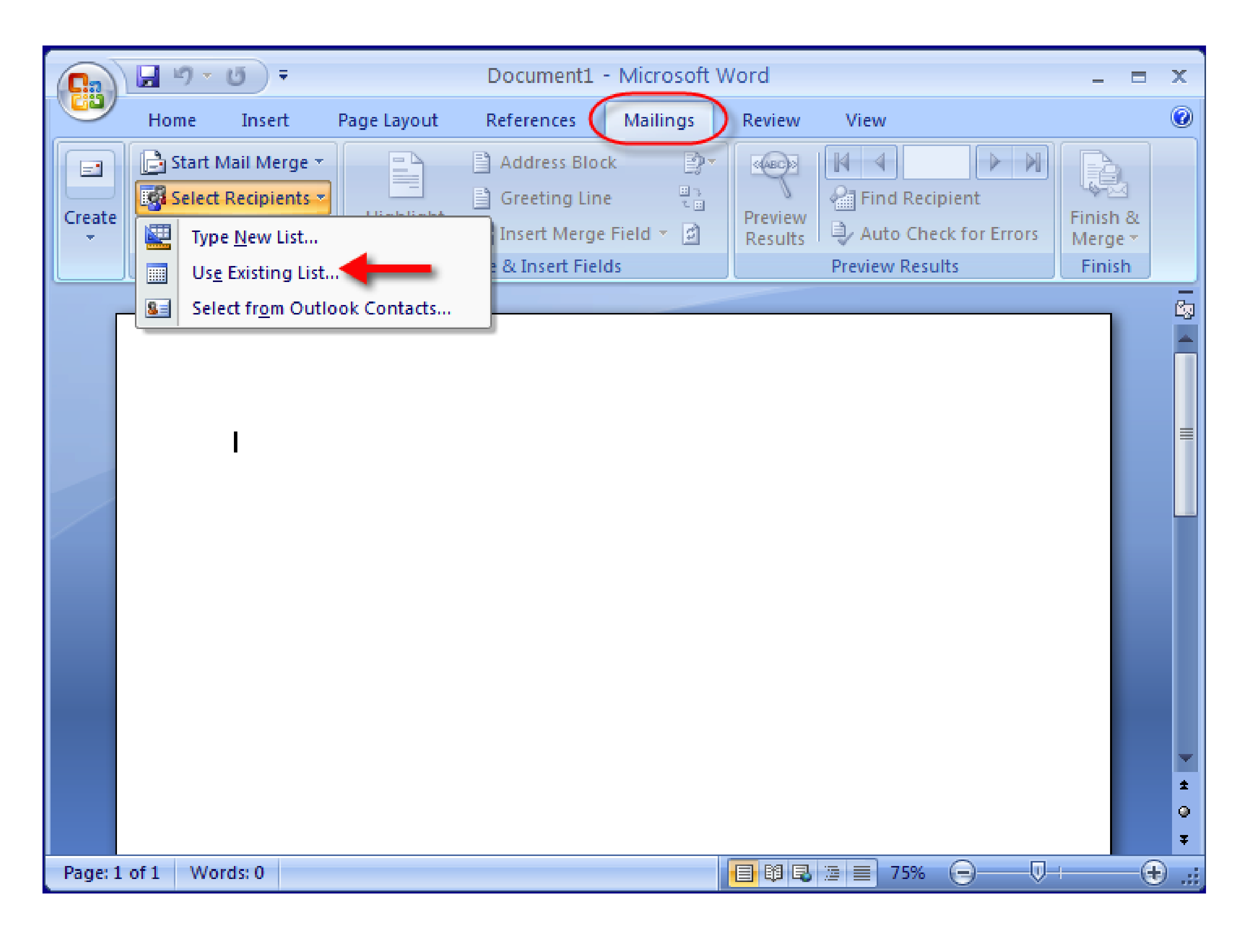


Click Yes, then enter the following description for the code and click OK:

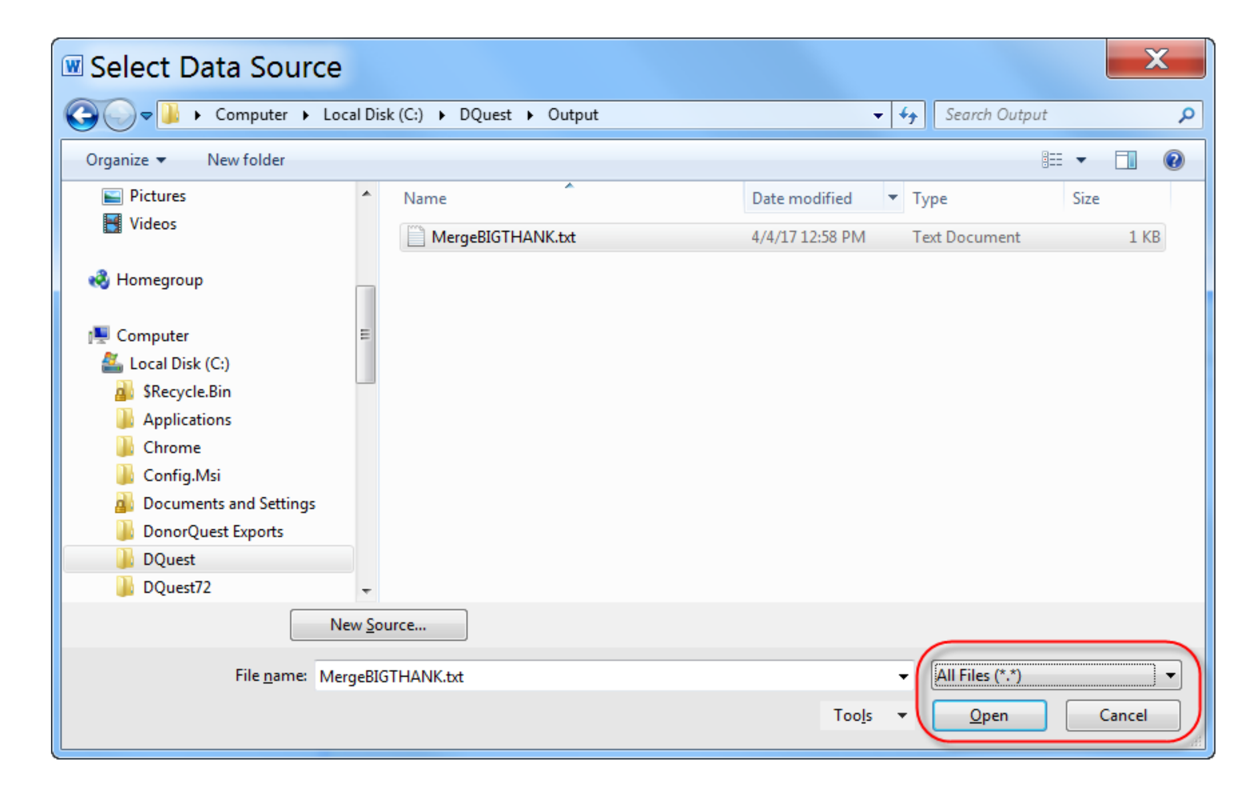


Complete the donation entry, then run the General Ledger process in DonorQuest by clicking on File, Run General Ledger. Use the General Ledger Process Options shown in the example screen at the very beginning of this topic, changing only the Lower and Upper donation date range to match the date you used for the donation (usually today's date). That should result in a preview window showing the one sample donation we are acknowledging. That's all you have to do in DonorQuest. The rest is done in Word.

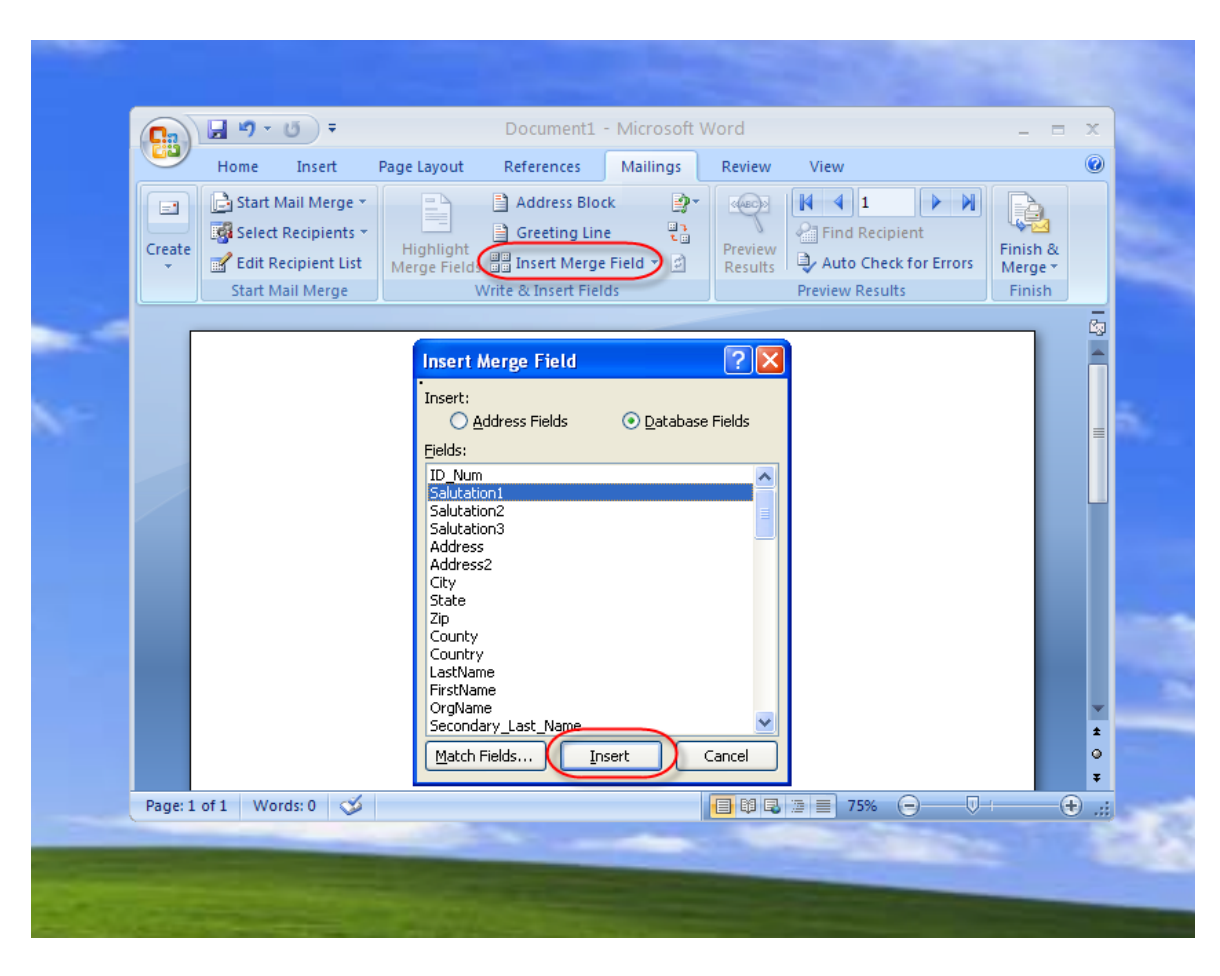
Now start Word with a blank document, and click on the Mailings tab, followed by the Select Recipients drop-down, as shown here:



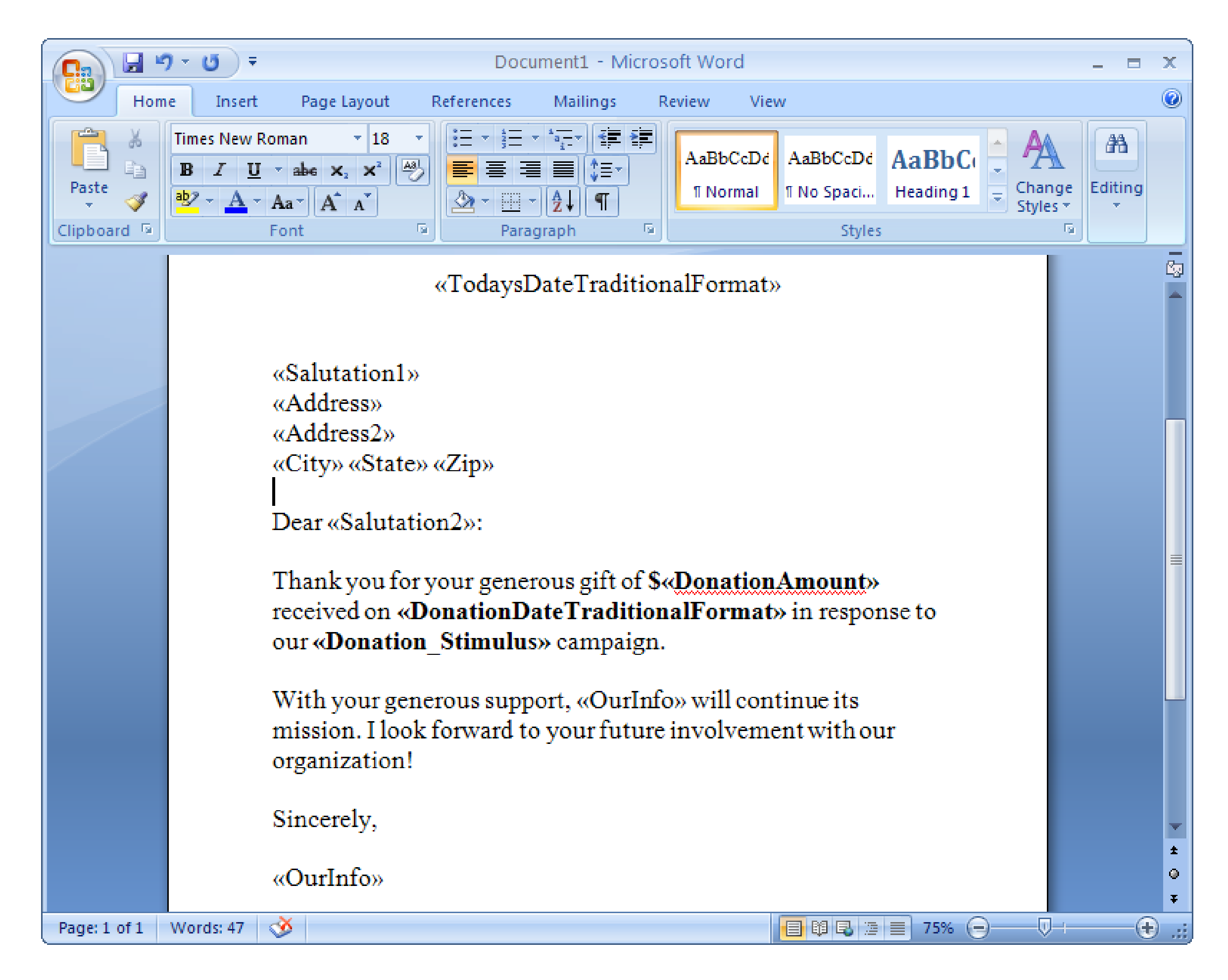
Choose the Use Existing List option. Word will then show you a file dialog. Navigate to the \DQuest\Output\ folder. This folder may be on your computer, or if you are using DonorQuest on a network, it will be on one of your network drives. Or, if you designated a specific folder in the General Ledger Process Options dialog, the file will be written there (you may wish to do this if you are running DonorQuest across the Internet, and you wish the merge file(s) to be written to a folder on your actual computer). Once you navigate to the folder containing the merge file, click on the Files Of Type option of the Select Data Source dialog, and choose all files. The MergeBIGTHANK.txt file should appear like this:



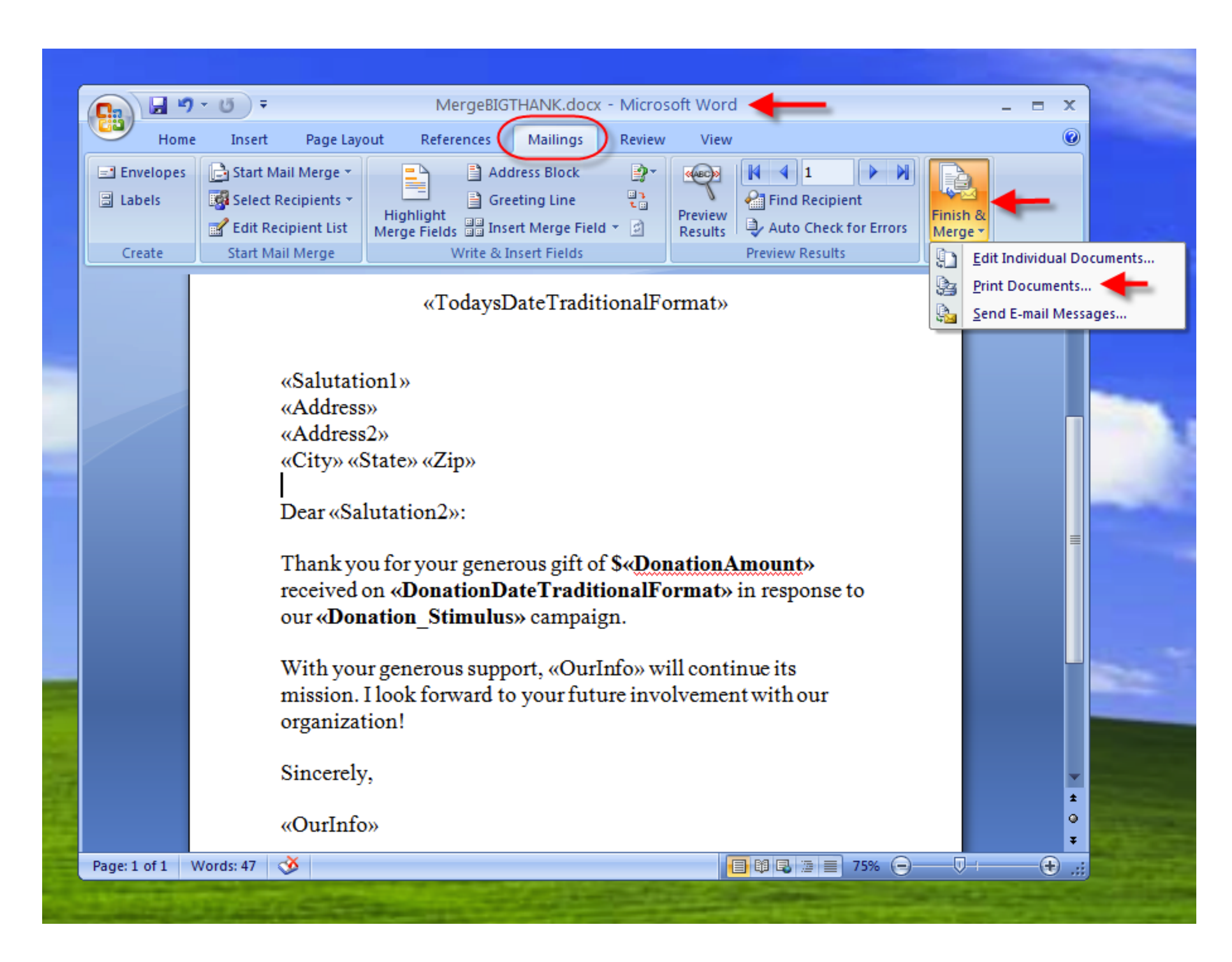
Highlight the file and click on the Open button. This will make the connection between the Merge data file and the Word form letter you are in the process of creating. This pairing will be saved when you save the form letter, so it will be in effect each time you open the Word document containing the form letter. Now click on the Insert Merge Field button, as shown here:



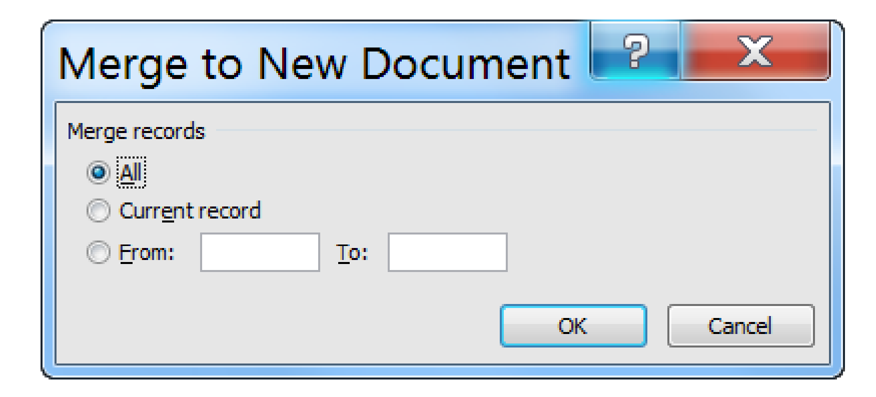
This will produce an Insert Merge Field pop-up menu with the available data fields from DonorQuest, as shown above. Construct the address block in your form letter, inserting the needed fields from this menu. Then also compose the body of your letter to have the verbiage you want. It should look something like this:



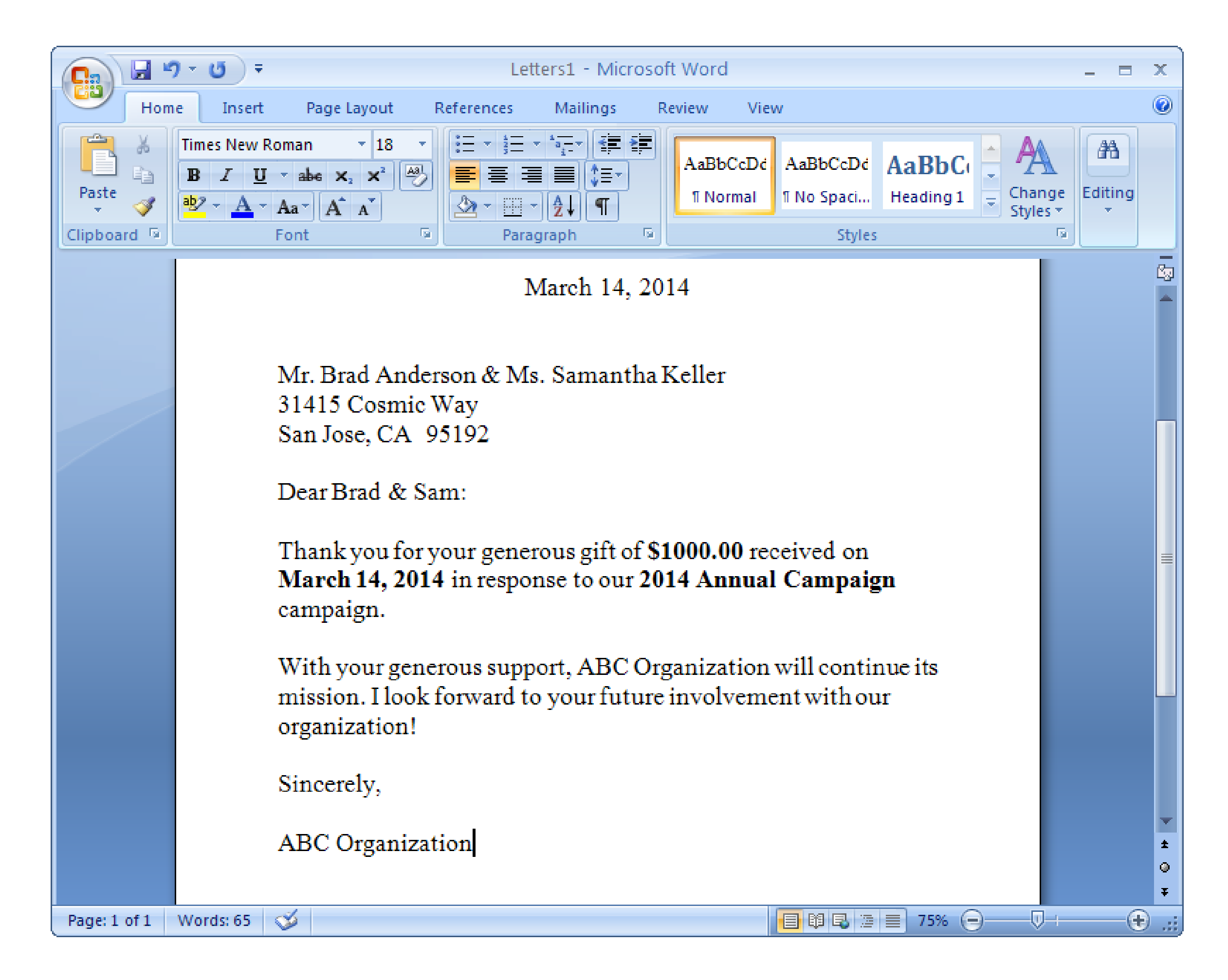
Now, most importantly, save this word document! For consistency you should use the same name as the merge file it is connected with, so in this example, save it as MergeBIGTHANK.docx. To try it out, click back on the Mailings tab, then click the Finish & Merge button, and from there choose Print Documents, like this:



If you would like to preview the merged letters before you print them, you can alternatively click on the Edit Individual Documents option (shown above), then chose the All option:



Click OK and you should see your final letters, ready for review and printing:


March 14, 2014

Mr. Brad Anderson & Ms. Samantha Keller
31415 Cosmic Way
San Jose, CA 95192

Dear Brad & Sam:

Thank you for your generous gift of **$1000.00** received on **March 14, 2014** in response to our **2014 Annual Campaign** campaign.

With your generous support, ABC Organization will continue its mission. I look forward to your future involvement with our organization!

Sincerely,

ABC Organization

Merge File Format

The merge files may created in either Comma-Separated Value (CSV) format, or Tab-Delimited Text (TXT) format. Technically, the CSV format is also a text file, but commas are used to separate the data instead of a tab character, and the field data is placed within quotes. Both formats are fully compatible with Word, so mail merges may be done directly without any conversion. Some users mistakenly think the data must be in an Excel spreadsheet to do a merge. This is totally not the case - Word can work directly with the standard delimited text files produced directly by DonorQuest, so there is no need to involve Excel.

Accounting Interface File

The General Ledger Process also automatically creates an Accounting Interface File so that you may import the donation information into another database. Account.txt is the default name, and like the mail merge files it is created in the DonorQuest Output folder, unless you direct it elsewhere.

Accounting Interface File Format

You have four choices for the Accounting Interface File Format:

1. Comma-Separated Value Text: This is a standard format using commas to separate field data, and quotes to encapsulate field data.

2. Tab-Delimited Text: This is also a standard format which uses tab characters to separate field data, with no encapsulation.

3. Fix-Width Text: This is an older format, mainly used by older accounting programs.

4. QuickBooks Intuit Interchange Format: A proprietary format used by the QuickBooks accounting software (more details below).

Limit Donations To

In addition to the lower/upper donation date range limitation, you can further limit the donations included by a filter expression which must evaluate to true or false. For example, if you do not want to have donations less than $100.00 in your output file, you could use the following expression: .Donation_Amount. >= 100. Or, you could limit processing to a specific donation batch number, like this: .Donation_Batch_Number. = 100

Sort Donations By

This is an optional order which can be specified if you want the main General Ledger report to be alphabetized by something other than the default order which is Last and First names. For example, you could order the report by Donation Check Number, or by Donation Amount. When ordering by numeric fields such as Donation Amount, you need to apply a conversion function to transform the amount to a character value, like this:

    Str(.Donation_Amount., 12, 2)

Fund Selector Expression

The second part of the General Ledger Report provides totals by Account, Stimulus, Type, and Fund. The Fund Selector Expression allows you to customize the grouping factor which goes into totalling by Fund. Normally it is simply the Donation Fund field, but you could, for example, customize it such that Funds are subtotaled within Donor Types with an expression like this:

    .Donor_Type. + .Donation_Fund.

Source For Ledger Process

You can run the General Ledger Process for the Main Database or the Posting File. It is recommended that you run the General Ledger Process from the Main Database unless you are using deferred posting mode for your donation entry. See the topic on Program Settings for more details.

When not running in deferred posting mode, the Posting File simply maintains copies of donation entries. It can optionally be used instead of the date range to restrict which donations are included in the General Ledger Process if you take care to purge the posting

file after each General Ledger run (by selecting System / Purge / Posting File). That way, the posting file would only have donations in it which still need to be acknowledged. But in practice, remembering to purge the posting file after each General Ledger run is a bit error prone, so running the General Ledger from the main database with a date range restriction is usually the best way to go.

NOTE: If you are running DonorQuest in deferred posting mode, the posting file contains the only copy of recently entered donations, so you must run the ledger process from the posting file if you wish to report on the most recently entered donations. Once you have run the ledger process and confirmed the accuracy of the current donation batch, you should run the posting process (File, Run, Donation Posting), which will move the donations from the posting file to the main database, and automatically purge the posting file.

Field Group For Ledger Report

This field group defines the columns of the first part of the General Ledger Report which show donation detail. Normally the pre-defined field group, "Ledger Report Field Group" is used for this, however if you would like to control the columns of the first part of the General Ledger Report, you may switch this to use a custom field group which you have created in the File, Open, Field Groups area of DonorQuest.

Field Group For Mail Merge

This field group defines the columns of the data file(s) produced as part of the General Ledger Process. Normally the pre-defined field group, "Mail Merge Field Group" is used for this, however as with any other place where field groups are used, you may switch this to use a custom field group.

Field Group For Accounting

This field group defines the data field which will be made available to your accounting software. Normally the pre-defined field group, "Accounting Interface Field Group" is used.

Transaction Account Number

This is the deposit account number used in your accounting software which you wish DonorQuest to post deposits towards.

Maximum Gifts Per Letter

Normally you will only want one gift record per letter. However, if you choose to do your acknowledgements less frequently, you may routinely have multiple gifts per donor to acknowledge. To avoid producing multiple thank-you letters for a single donor, you could set this number to 2 or higher. However, you will have to take care to accommodate the extra data fields in your form letter. Increasing the number to 2 will double the number of donation data fields for each donor -- you will have two donation dates, two donation amounts, etc. Specifying 3 will triple the number of fields, etc. The additional fields will be present for all donors in each record of the merge data source files, whether a given donor has that many donations to acknowledge or not. So you will need to structure your form

letter accordingly, probably having a middle section which will list multiple donations, accounting for the fact some of the extra donation fields may be blank for a given donor.

Printing Options

This controls output for the printed portion of the General Ledger Process. Among the standard print and preview options, you may select no printed output at all if you simply want to run the General Ledger Process to create the mail merge and accounting interface files.

Font

This is the font for the report. All parts of the report will be printed using this font.

Point Size

This is the point size which will be used for the body of the report (all the data). DonorQuest will automatically print the column titles and page headings a few points bigger than this and in bold to help them to stand out from the data.

Use Landscape Mode

Turn this on for landscape mode printing when you need more horizontal column space. This rotates the printing to give you as much horizontal printing space as possible. It is recommended you use landscape mode if using our stock report column settings.

Page Margins

Here you can set the Top, Left, Bottom, and Right page margins. Units are in inches.

Create Selection Result For General Ledger

If the Create Selection Result For General Ledger check box is turned on, then a selection result containing the donors to receive thank-you letters will be automatically created when you run the general ledger process. This is convenient when you wish to run mailing labels for all the thank-you letter donors. Note that this has nothing to do with the automatic mail merge file creation -- that is always done when you run the general ledger process. Also, many organizations use envelopes with a window, allowing the name/address information on the actual thank-you letter to show through, which eliminates the need to print separate mailing labels for the thank-you letters. So this option is rarely used.

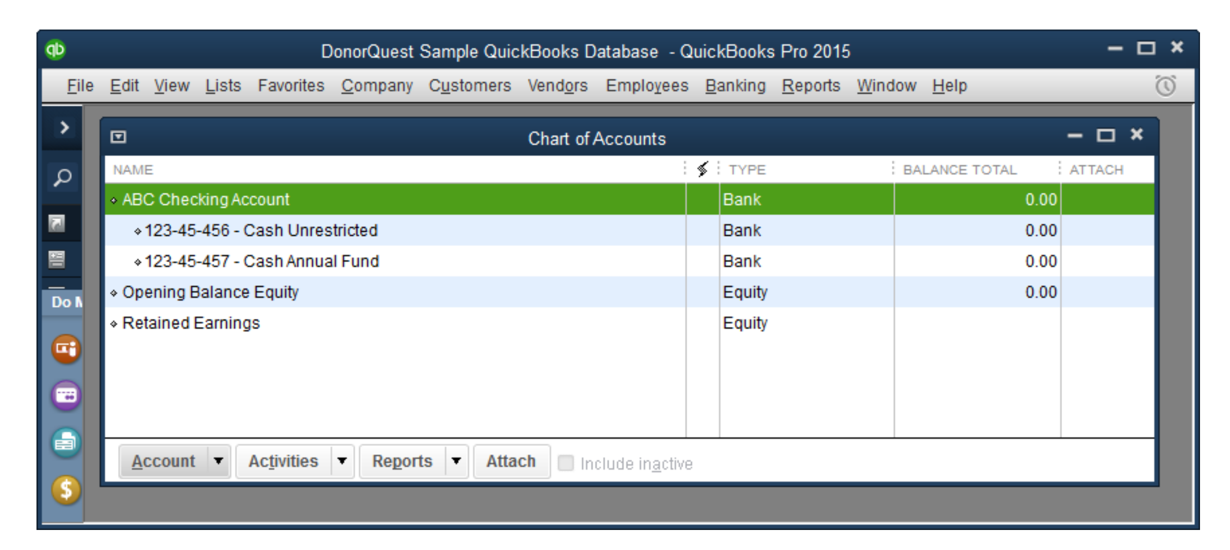
Use Thank-You Code Description In Creating Merge File Names

When this check box is on, DonorQuest will use the thank-you letter code descriptions, rather than just the codes, for creating the mail merge data files. In the examples shown above under the Base Name For Merge File section, instead of creating the mail merge files just using the thank-you letter codes, DonorQuest would use the code descriptions, and the two mail merge files produced would be:

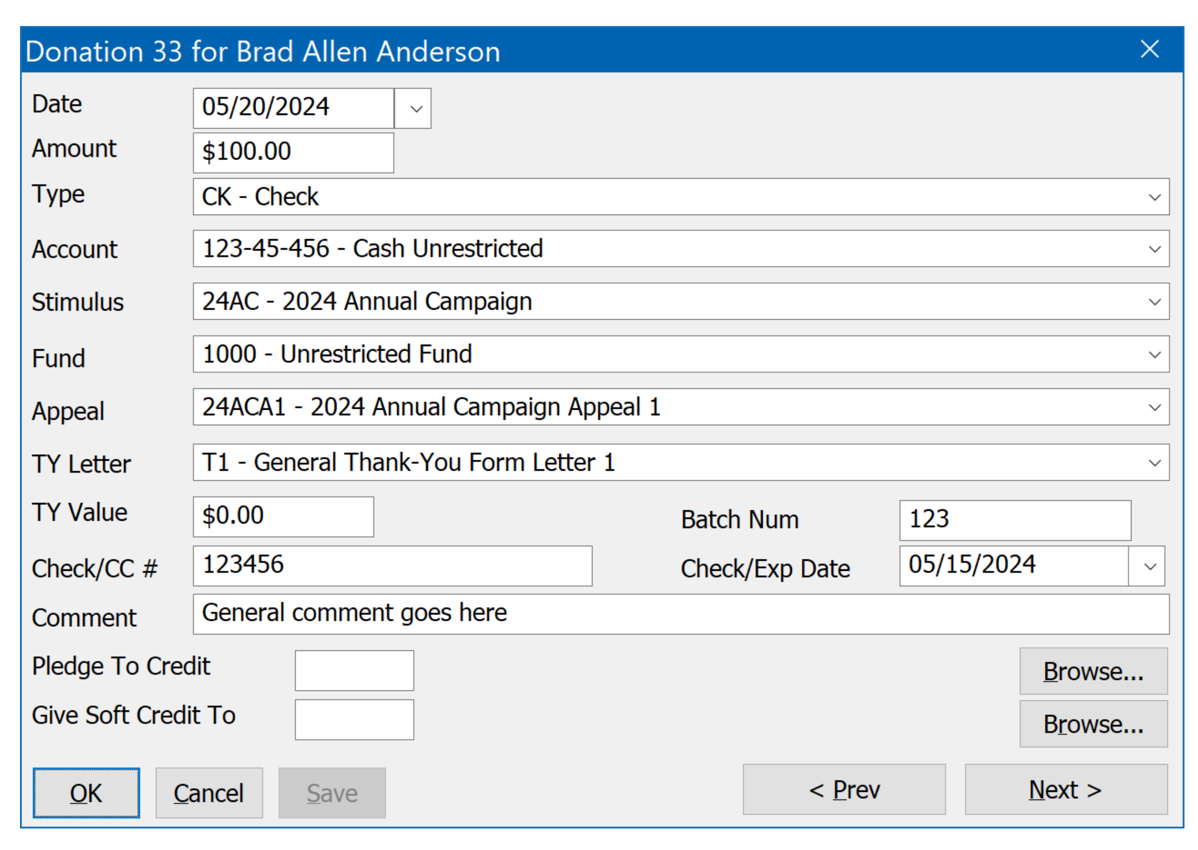
Merge-Basic Thank-You Letter For Donations From Non-Major Donors.txt
Merge-Specially Worded Thank-You Letter For Our Best Donors.txt

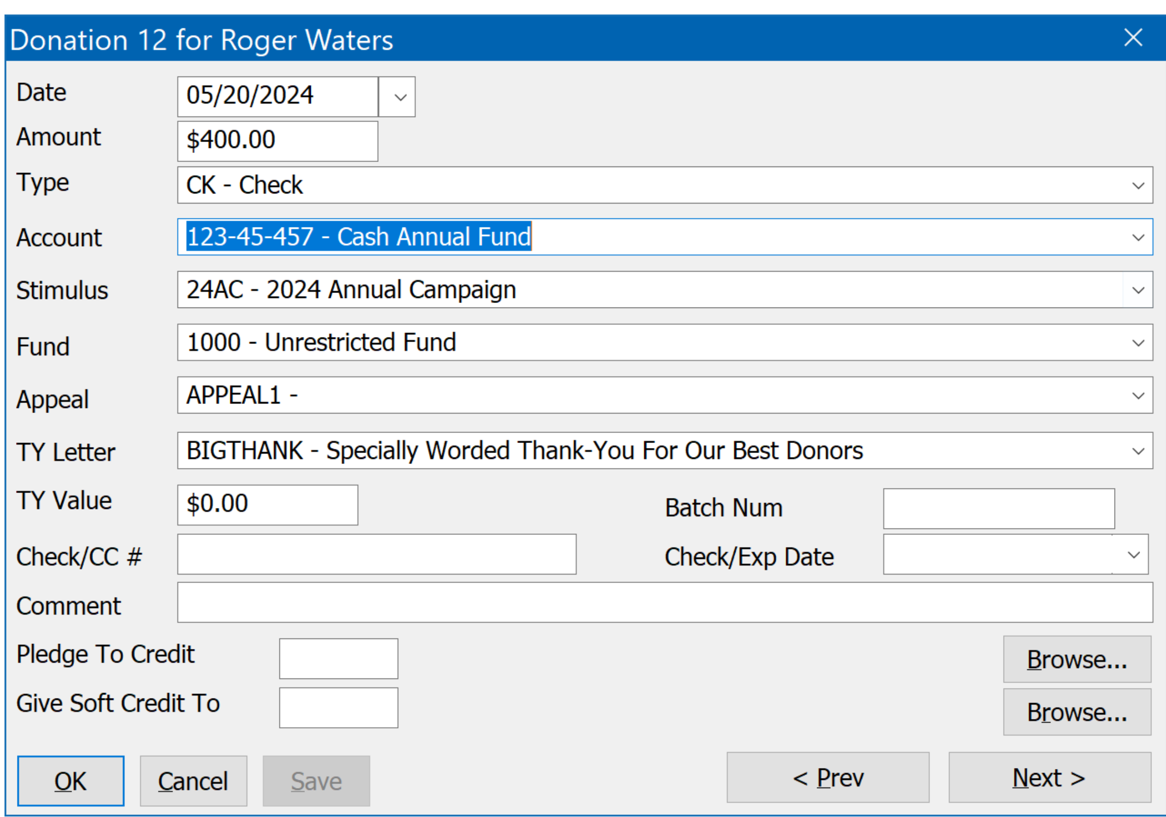
QuickBooks Interface

When you choose QuickBooks for the Accounting Interface File Format, DonorQuest will create a QuickBooks format accounting interface file. This file is ready for direct import to QuickBooks, and contains all of the transaction detail (including donor names) for the gifts included in the General Ledger run you are doing. Here's an example of how to setup your organization's checking account information in QuickBooks to make use of this feature:

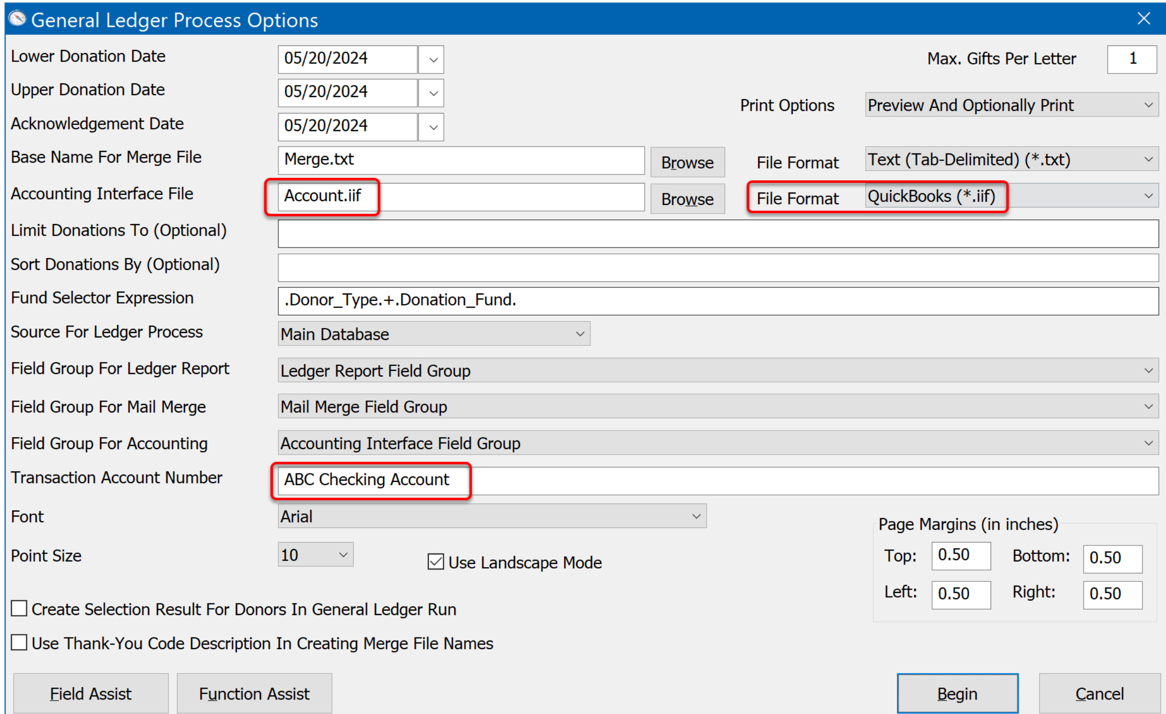


In the above example, we have a deposit checking account named, "ABC Checking Account." Within that account, we have setup two sub accounts of, "123-45-456 - Cash Unrestricted" and "123-45-457 - Cash Annual Fund." These sub accounts correspond to the Donation Account field in DonorQuest, and provide a way for you to categorize each donation both within DonorQuest and QuickBooks. The number of sub accounts you may have is unlimited, both in DonorQuest and in QuickBooks. Now let's enter the following two donations in DonorQuest, assigning each to one of the two sub accounts above:

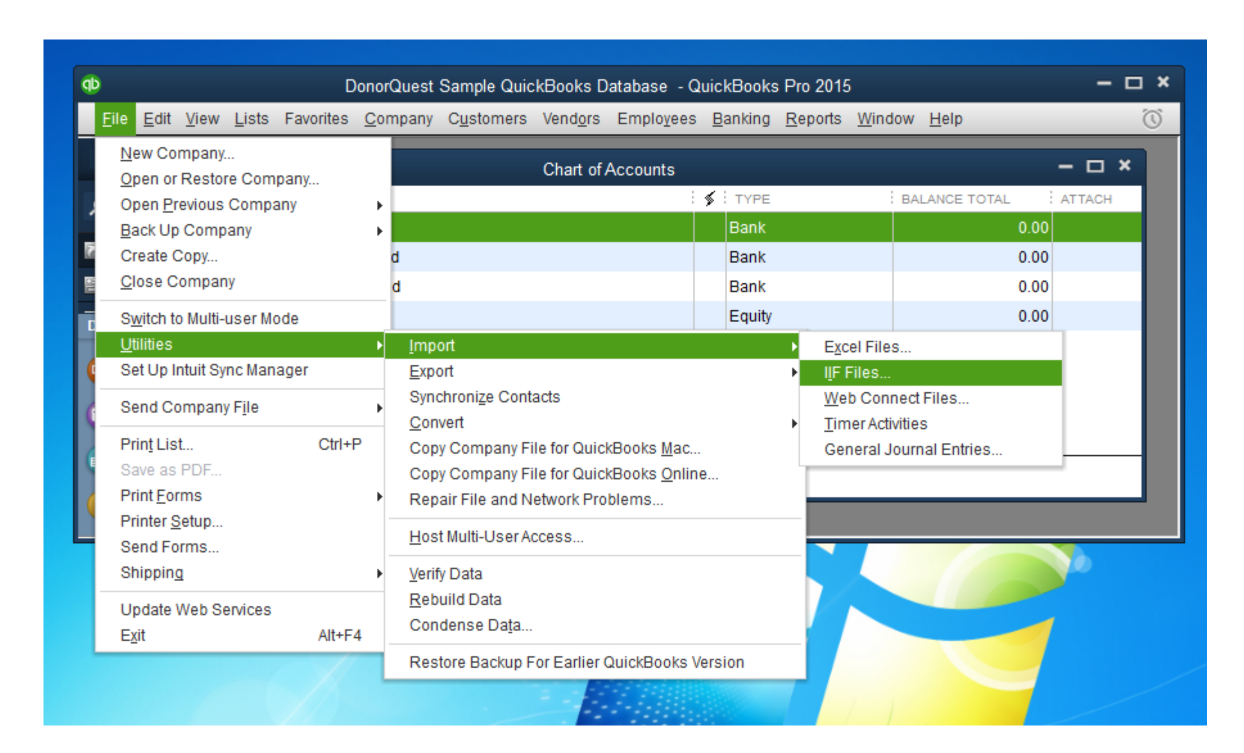

Donation 33 for Brad Allen Anderson
Date
05/20/2024
Amount
$100.00
Type
CK - Check
Account
123-45-456 - Cash Unrestricted
Stimulus
24AC - 2024 Annual Campaign
Fund
1000 - Unrestricted Fund
Appeal
24ACA1 - 2024 Annual Campaign Appeal 1
TY Letter
T1 - General Thank-You Form Letter 1
TY Value
$0.00
Batch Num
123
Check/CC #
123456
Check/Exp Date
05/15/2024
Comment
General comment goes here
Pledge To Credit
Browse...
Give Soft Credit To
Browse...
OK
Cancel
Save
< Prev
Next >


Donation 12 for Roger Waters
Date
05/20/2024
Amount
$400.00
Type
CK - Check
Account
123-45-457 - Cash Annual Fund
Stimulus
24AC - 2024 Annual Campaign
Fund
1000 - Unrestricted Fund
Appeal
APPEAL1 -
TY Letter
BIGTHANK - Specially Worded Thank-You For Our Best Donors
TY Value
$0.00
Batch Num
Check/CC #
Check/Exp Date
Comment
Pledge To Credit
Browse...
Give Soft Credit To
Browse...
OK
Cancel
Save
< Prev
Next >

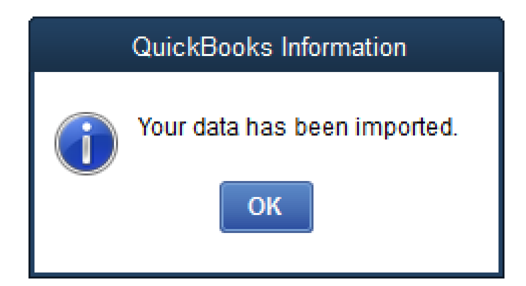

When we run the General Ledger Process in DonorQuest, we use the following settings:



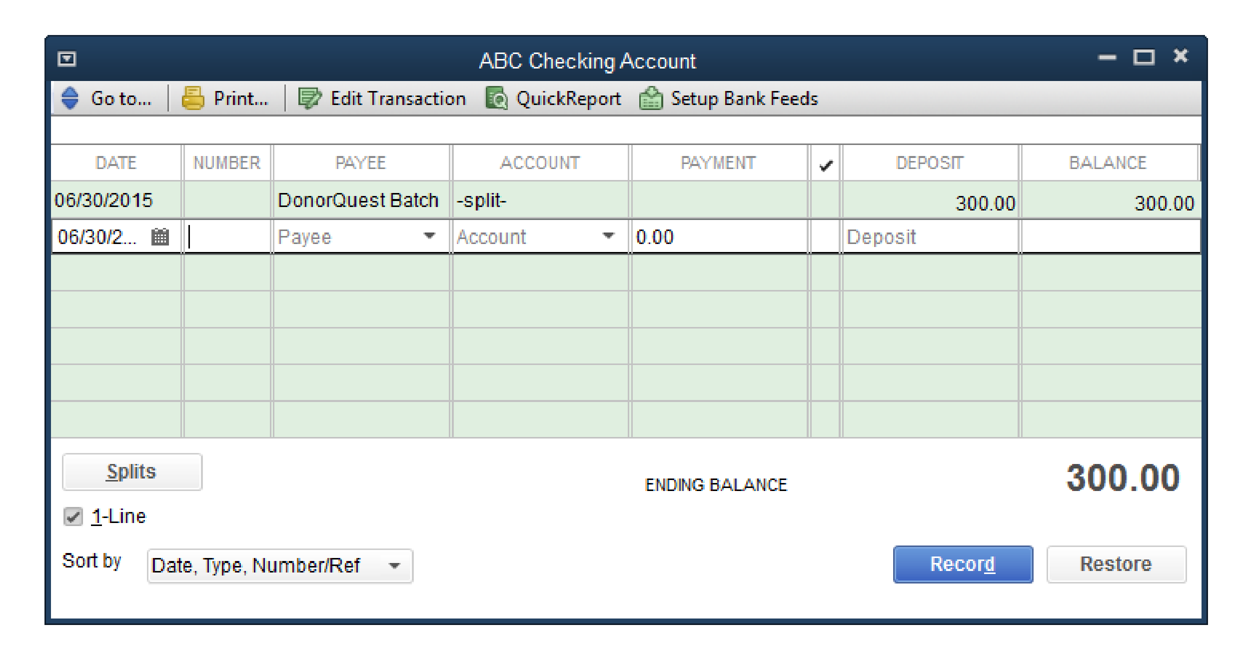
Notice the items circled in red. The Transaction Account Number (which is actually alphanumeric) is where we enter the name of the deposit account we wish the donations to go into in QuickBooks. In our example, we are using, "ABC Checking Account." When we click the Begin button, DonorQuest will create a file named Account.iif in the \DQuest\Output\ folder (or you may use the Browse button next to the Accounting Interface File to choose a different location on your computer or local area network). Once the General Ledger Process has completed in DonorQuest, the final step is to import the new transactions into QuickBooks. This is done within QuickBooks by clicking on File, Utilities, Import, IIF Files, as shown here:



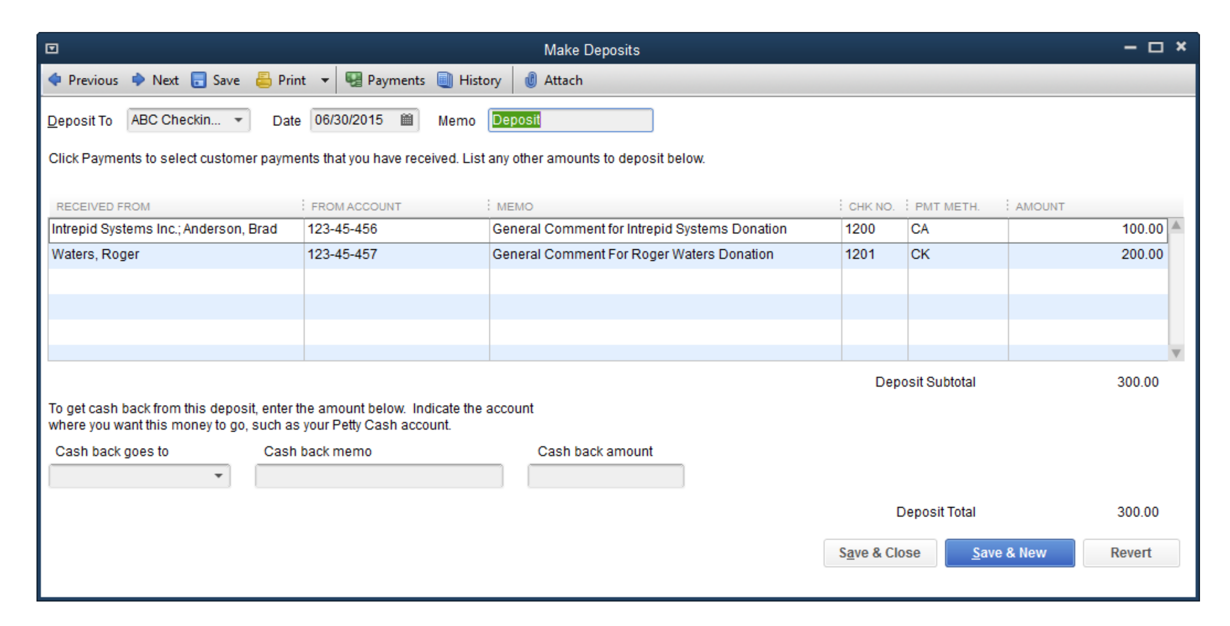
QuickBooks will prompt you for the Account.iif file created by DonorQuest. Navigate to the folder where you directed DonorQuest to save the file and open it. You should then see the following confirmation from QuickBooks:



Looking at the QuickBooks Register for our ABC Checking Account, we now see a single line-item representing the total deposit amount of $300 for the two donations:

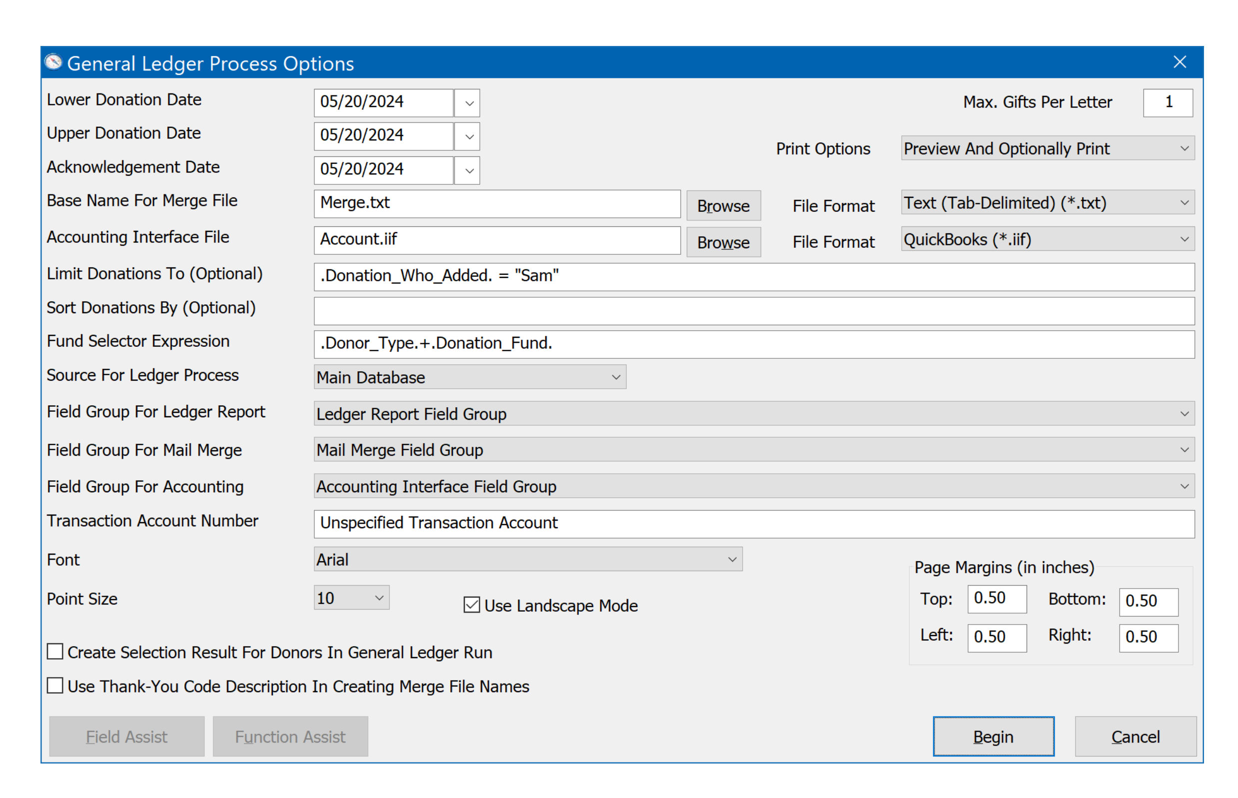


If we double-click on the -split- column for the deposit line item, we can see the individual transactions making up the batch, which include the names of the actual donors:



11.2 Accommodating User-Specific Donation Batches

There are a couple ways to manage this. If you are doing donation entry with the standard multi-window view, you could reference the user's name when you run the General Ledger in addition to the donation date range. This would limit processing of the General Ledger (and related thank-you letter merge files) to those donations entered by a specific user. For example, if user Sam wanted to the run the General Ledger Process for just gifts he has entered, he would do it like this:



Notice how the "Limit Donations To (Optional)" is set to:

.Donation_Who_Added. = "Sam"

This will filter donations only allowing those which were added by user, "Sam". Notice also how the Base Name For Merge File is set to c:\Temp\Merge.txt. This may not be necessary in your case unless the multiple users run the Ledger Process and process their letters at very close to the same time. If they do, then writing the output files to a private folder on each user's respective workstation drive would eliminate the possibility of user Sam overwriting users Jane's merge files before she is done printing thank-you letters with them.

The other way to handle this situation is to begin using the DonorQuest Donation Batch Entry mode for entering gifts, and allow each user their own block of batch numbers. This is done by clicking on Donor, Batch Donation Entry. All donations for each batch will be assigned a batch-specific batch number, which may then be used in the General Ledger Process to identify which batch to process, again using the Limit Donations To option of the General Ledger Process Options dialog. But in this case you would limit the donations included by batch number instead of user name, like this:

.Donation_Batch_Number. = 504

Topic XII

12 Importing

The process of importing means to bring information into DonorQuest. This can be donor information, including donations for existing donors, as well as DonorQuest-specific components such as Report or Label Layouts and Field Groups which may have been created by DonorQuest users in other organizations, or by DonorQuest Support. Donor information can be imported from standard Comma-Separated Value (CSV) files, or Tab-Delimited Text (TXT) files. If you would like to import an Excel spreadsheet, first save it out of Excel as a .csv file.

DonorQuest component objects such as report layouts, label layouts, field groups, and selection definitions all use the EXP file extension, which is short for Expansion file.

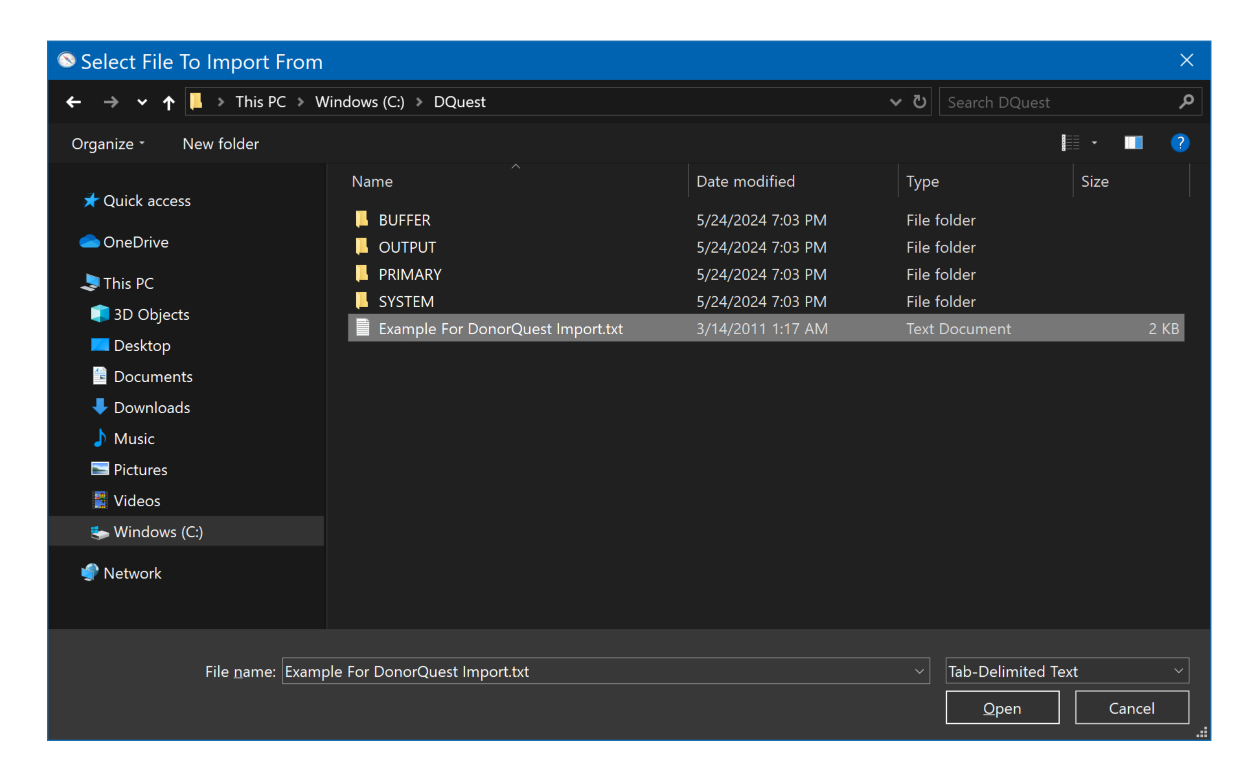
12.1 Donor Data

DonorQuest has a very extensive donor data import facility which allows for the importing of completely new donor accounts, as well as for the updating of existing donor accounts, including the import of new donation records or corrected addresses during NCOA or CASS Certification processing. All of the fields you may enter information in directly are available as a destination for imported data, including any user-defined fields you may have created. DonorQuest will accept data in either the CSV format, or in a tab-delimited text file. These are universal formats also used by Microsoft Excel and Access for data exchange. If you have data in an Excel spreadsheet that you would like to import into DonorQuest, you would first save the Excel spreadsheet in CSV or tab-delimited text format.

Let's get right into it with a sample import, using a tab-delimited text file. The file is named, "Example For DonorQuest Import.txt" and is included in your DonorQuest installation. You should find it directly in the \DQuest\ folder. There is also an Excel version of the file, if you would like to examine it first that way. It has the following columns:

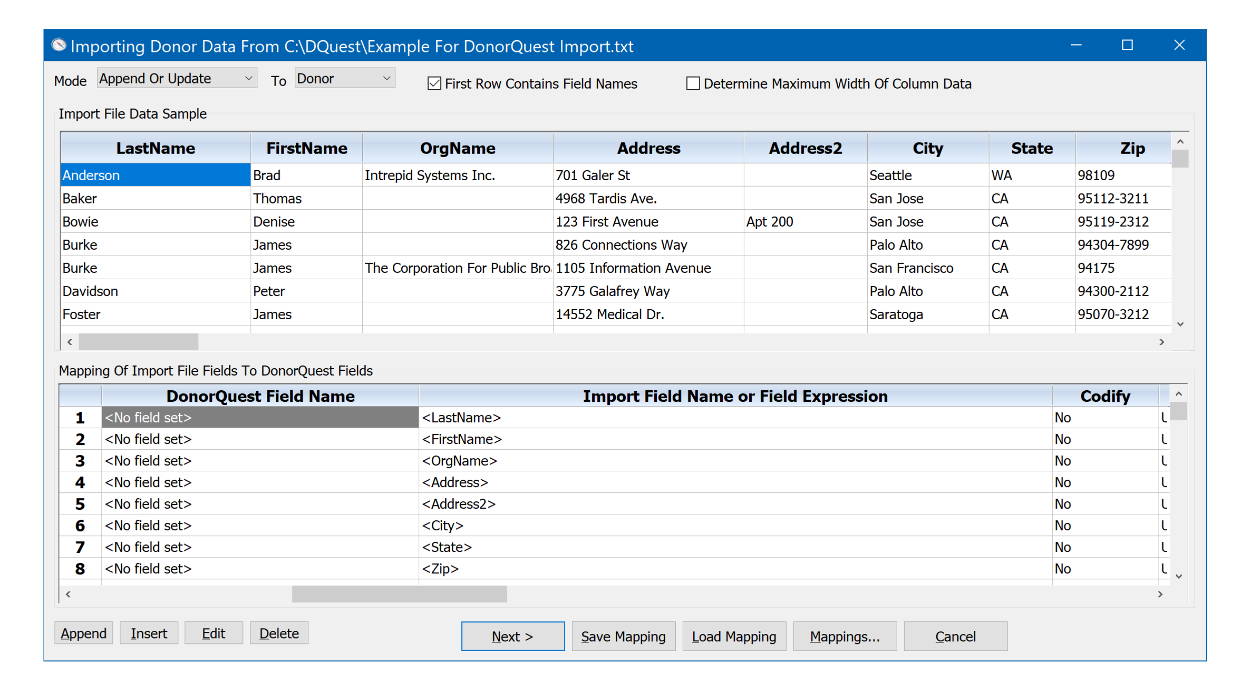
LastName, FirstName, OrgName, Address, Address2, City, State, Zip, County

From within DonorQuest click on File, Import, Donor Data. A file dialog will open. It may already be open to your \DQuest\ folder, if not, navigate to it. It should look like this:



If you are using the cloud-based version of DonorQuest, you can download this sample file to your computer using this link: www.DonorQuest.com/downloads/ExampleForDonorQuestImport.csv

Be sure the file, "Example For DonorQuest Import.txt" is highlighted, then click the Open button. The DonorQuest Import Dialog should open like this:

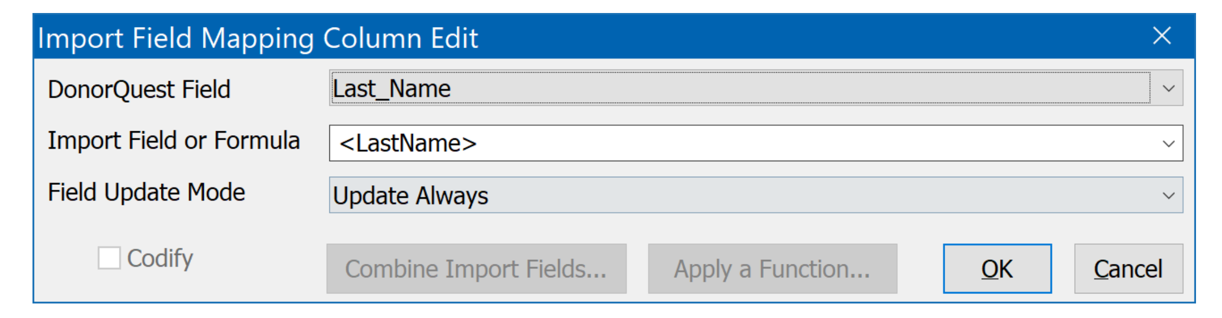


The DonorQuest import dialog consists of two window panes. The top pane, called the

Import File Data Sample, shows a preview of the raw data in the import file you are working with. If the first row of the import file contains field names (which the sample file does), they will be shown as column headings in the sample. If the import file has only data and no field names, numeric field names will be created for the columns. The bottom pane is where you will tell DonorQuest what goes where -- it is the Mapping Of Import Fields To DonorQuest Fields. Quite simply, this is where you match up data columns from the import file with the most reasonable matches with the available data fields in DonorQuest.

The Mapping Of Import Fields To DonorQuest Fields consists of two columns. As the example above shows, the right-hand column, titled, "Import Field Name or Expression", is already pre-populated with the field names from the import file. The left column titled, "DonorQuest Field Name", is where we choose the DonorQuest field which corresponds to each import file field. This is how DonorQuest will know where to put the data from each field of the import file. Setting up this correspondence is called creating a field mapping, and it is really all there is to doing an import.

To create or mapping, we proceed one field at a time down the lower window pane, pairing up fields from the import file with the DonorQuest fields which best match. We do this by double-clicking each place it says, "<No field set>", and then deciding which DonorQuest field best fits. In the example above, here is how the first pairing should look:



If your import file contains any fields (columns) you do not want imported, simply delete them from the mapping using the Delete button, and they will not be included in the import.

Codify

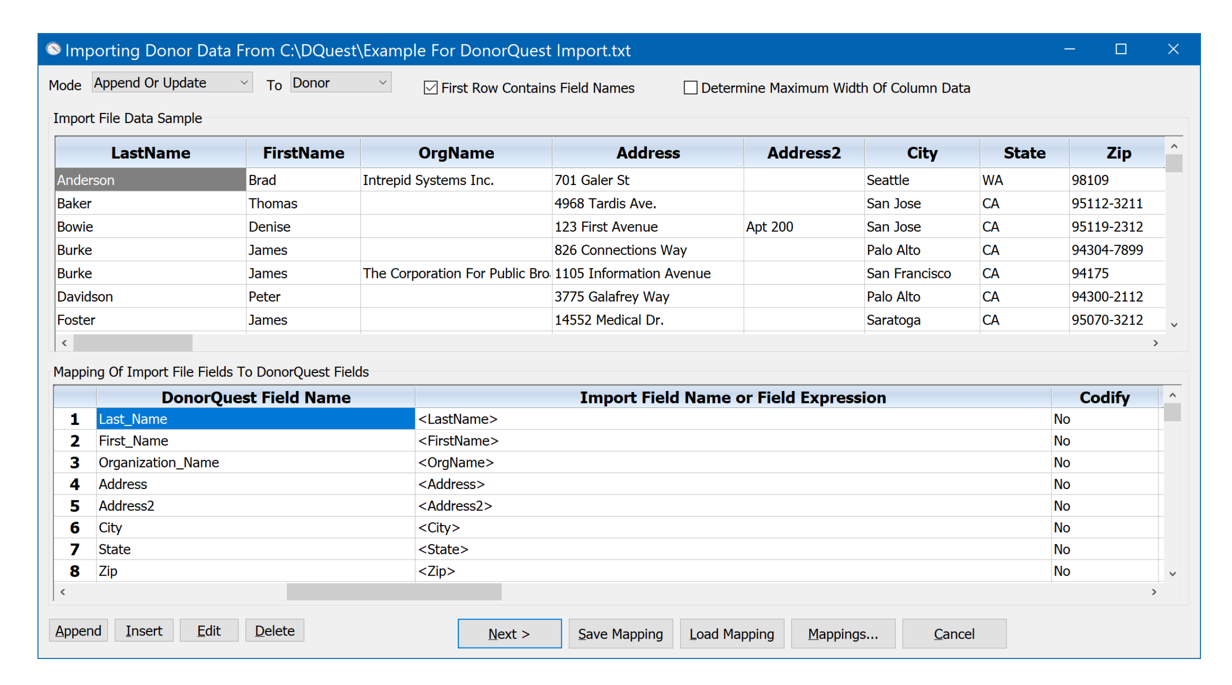
The AppendThe Codify check box on the above dialog is an optional feature used only with coded DonorQuest fields. It should be checked on if you are importing non-coded data to a coded field in DonorQuest. DonorQuest uses codes for many fields to ensure accurate and consistent data entry of critical information. This is true of most fundraising software programs, so it is likely some of the data you are importing is already in a coded form if you are migrating from another fundraising program. For example, the Donation Stimulus or Campaign Code is a coded field in most systems. The State abbreviation for a mailing address also serves as an example of a code, for which the full spelling of the state is the description of the code. However, if you are importing from a system (or hand-created spreadsheet) which, for example, has long descriptions of campaigns only as opposed to both concise codes and code descriptions (as DonorQuest uses), you would use the codify option. DonorQuest would then create a unique code for each imported campaign description and assign the description to the new code on the corresponding drop-down

list on the data entry forms.

Field Update Mode

The Field Update Mode tells DonorQuest what to do when it is updating existing constituent records. Update Always is the default mode, and it will unconditionally replace whatever may be in an existing field with what is coming in from the import file. The, "Update Only If Target Is Empty" option will only update the corresponding field of an existing record if that field doesn't already have something in it. Lastly, the, "Update Only If Source Has Data" mode will replace whatever may be in an existing field, but only if the import file actually has replacement data for the field. Note that only constituent information stored in the Header table can be updated, since there is only one header record per constituent, and that's where these options come in. Donation, Pledges, etc. are always only added anew during the import process, so no existing Donation, Pledge, etc. information is ever overwritten by an import.

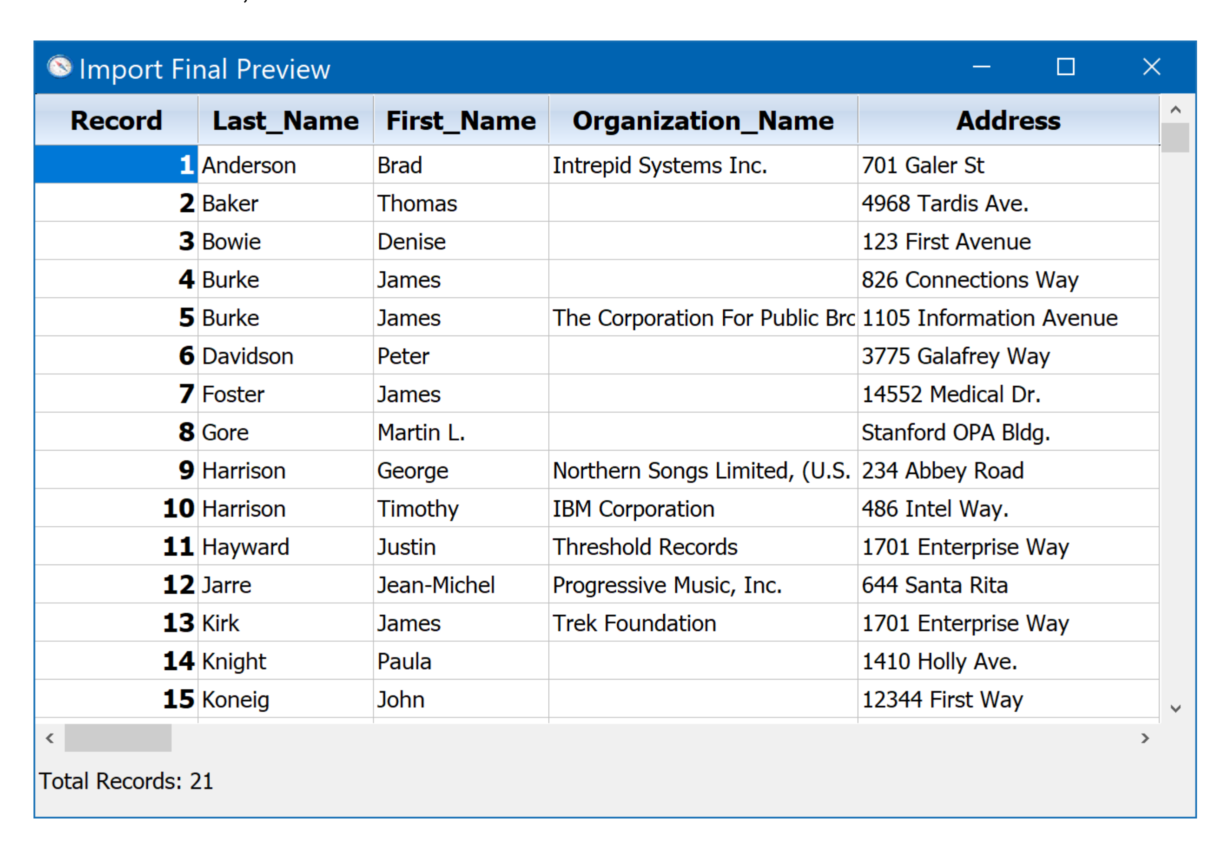
When you have paired up all the import fields with the corresponding DonorQuest fields, the Import window should look like this:



At this point you should click on the Save Mapping button. This will save the mapping work we have done so far so that if we were to close the import window and resume our work later, we could pick up where we left off. Once you save a mapping, it will be associated with the import file you are working on, so that if you begin an import again from the same file, DonorQuest will automatically apply the mapping as it was when you saved it. This is especially convenient if you get an import file on a regular basis with new data, but the same record layout. This is actually quite common if you are importing names, addresses, and donations on a regular basis from your organization's website, for example.

Once we have established the field mapping for the import file we are working on, we are ready to click the Next> button. This will open a final preview window, which will show

exactly what is about to happen. It is the last chance we will have to confirm that all the fields have been mapped properly before the new information is actually committed to the DonorQuest database. Following the above example, this will open the Import Final Preview window, which looks like this:



Record	Last_Name	First_Name	Organization_Name	Address
1	Anderson	Brad	Intrepid Systems Inc.	701 Galer St
2	Baker	Thomas		4968 Tardis Ave.
3	Bowie	Denise		123 First Avenue
4	Burke	James		826 Connections Way
5	Burke	James	The Corporation For Public Brc	1105 Information Avenue
6	Davidson	Peter		3775 Galafrey Way
7	Foster	James		14552 Medical Dr.
8	Gore	Martin L.		Stanford OPA Bldg.
9	Harrison	George	Northern Songs Limited, (U.S.	234 Abbey Road
10	Harrison	Timothy	IBM Corporation	486 Intel Way.
11	Hayward	Justin	Threshold Records	1701 Enterprise Way
12	Jarre	Jean-Michel	Progressive Music, Inc.	644 Santa Rita
13	Kirk	James	Trek Foundation	1701 Enterprise Way
14	Knight	Paula		1410 Holly Ave.
15	Koneig	John		12344 First Way

Total Records: 21

Clicking Finish would commit the data and complete the import. Clicking <Back would take us back to the import mapping window so that we can make corrections, or cancel the import all together. If you are running DonorQuest with your organization's live data, you should of course not complete this sample import. If you have installed the DonorQuest trial version and are just experimenting, feel free.

Note that DonorQuest is capable of importing donation information as well as basic name/ address information. In fact, you may import data to any field in DonorQuest which you would normally have access to with manual entry, including any custom fields you may have created. The mapping process shown above is the same for donation information -- you would simply map the donation-specific columns of your import file to the corresponding donation fields in DonorQuest. DonorQuest will also support importing multiple donations for the same donor when the donations are in separate records of the import file, and even when they are in additional columns of the same import record.

We will now discuss some of the options of the Importing Donor Data window:

Mapping Mode

The Mapping Mode controls how the data you are importing interacts with the existing data

in your DonorQuest database. There are four mapping modes:

Append Or Update

The Append Or Update mapping mode is the default setting. In this mode, before a new a constituent record is added to DonorQuest from the import file, DonorQuest will first check to see if the record already exists. If it does, then the existing record will be updated with any new information from the import file. If no matching record exists, a new one will be created. When a match is found, all biographical (Header table) fields referenced in the import mapping will be updated based on the Field Update Mode you choose for each field (explained above). However, existing donation records will never be updated, only new donations added. This is also true of the other tables which support multiple records per donor (Pledges, Extra Addresses, Memos, Contacts, etc.).

Append Only

Like the Append Or Update mapping mode, The Append Only mapping mode will also check to see if a matching constituent record already exists in DonorQuest before adding a new one. However, in this mode only new records will be added. Existing matching records will not be updated. If an existing matching record is found for a record from the import file, the import record will simply be skipped over. The skipping over of an import record means that any donations, Extra Addresses, Pledges, etc. it contains will also be skipped. This mode should be used when the import file should only contain completely new constituent records, and when you want to protect your existing constituent records from being changed in any way by the imported records.

Update Only

The Update Only mode is typically used to apply address corrections and to add new donations, pledges, etc. for existing donor records. It can be used, for example, to process a file of new donations for donors who are expected to already be in DonorQuest. It should be used when you want to insure that a record from the import file has a corresponding record already in DonorQuest for the import record to be processed. This mode is most appropriate for use in re-importing records that were exported from DonorQuest for external processing, such as Zip+4 or address correction services. This will prevent any constituent records you may have deleted (while your address correction file is being processed) from coming back.

Append Always

The Append Always mapping mode should be used when you know the file you are importing from only has new information, and you in fact want to protect existing records in DonorQuest from being updated in any way by the imported records.

How Existing Records Are Found

Except for the Append Always mode, all mapping modes employ the same conditions for determining if an import record already exists in DonorQuest. Making this determination depends on the fields available to DonorQuest in the import mapping. Some fields are more helpful to DonorQuest than others, so it gives priority to those key fields when

looking for an existing matching record. The following possible field combinations are considered in order, each by itself being enough to determine whether an existing matching constituent record exists. If none of these field combinations are present in the import mapping, DonorQuest will not allow an import:

1. The unique donor (constituent) ID number, created and assigned by DonorQuest when a donor is first created.
2. A primary email address.
3. A secondary email address.
4. A first name, last name, city, state, and zip.
5. An organization name, city, state, and zip.

Number one above is a special case of importing back into DonorQuest records which were originally created in DonorQuest, then exported and modified outside of DonorQuest. An example would be Zip+4 processing of your mailing list, or any other external processing which may be done by a 3rd party such as address correction. That's why it's essential to always include the donor ID in any data you export from DonorQuest if you plan to reimport the records at a later date after they have been partially or completely modified -- the ID is all that is needed to uniquely identify the original record.

Note that when importing data originating in another database system, you normally would ***never*** map the ID of the other system to the ID field used by DonorQuest (ID_Num). These ID's would normally be wildly different between DonorQuest and the other system and at best would break the nice sequential allocation of donor ID's for new donors in DonorQuest. At worst, existing donor records in DonorQuest could be overwritten by completely unrelated donors from the other system, simply because they have the same ID. The one very rare exception to this rule would be if you are using DonorQuest as a secondary system to periodically receive data from another system, and you would always want the donor accounts and their assigned ID numbers to be identical between DonorQuest and the other system. In that case, the other system would always serve as the source for new donor records, and you would never originate new donors in DonorQuest.

The Import Destination

The "To" option on the main import window has a drop-down list with three options: Donor, Archive, and Buffer. These three options correspond to each of the three datasets in DonorQuest. The Donor dataset is where all of your active donor accounts are kept, so this will most often be the destination for your import. However you may also import directly to the Archive dataset where inactive donors are stored. The Buffer dataset is a good destination to use if you would like to just practice an import without affecting your live donor data. The Buffer dataset has various uses, but the information it contains must always be considered temporary, as it can be purged at anytime by clicking on System, Purge, Buffer Tables.

First Row Contains Data Fields

Normally the first row of your import file will contain field (column) names to describe the

data in the file, such as Last Name, First Name, Address, etc. DonorQuest will usually detect this and check this box for you. However, some data files are created without field names. In that case, DonorQuest will create field names for you such as Field1, Field2, Field3, etc. These DonorQuest-generated field names may then be used in your import mapping. If DonorQuest is unable to determine whether the import file contains valid field names, it may guess incorrectly and you will have to check or uncheck this box accordingly.

Determining Maximum Width Of Column Data

Sometimes you will be dealing with an import file from a source you are unfamiliar with. Some of the data columns might in fact have no data at all. There is usually no reason to map empty columns from the import file to DonorQuest fields, unless you are performing an update of existing DonorQuest records from a trusted source and you want to allow totally blank columns to blank out the correspondingly mapped fields in DonorQuest. In most cases, you will simply not want to bother mapping empty columns. When you click on the checkbox, "Determine Maximum Width Of Column Data", DonorQuest will preprocess the entire import file, determining the largest value (in characters) each column contains. That character count will then be shown as part of the column title in the Import File Data Sample. You will then quickly be able to spot columns with no data, as they will have a zero next to the name.

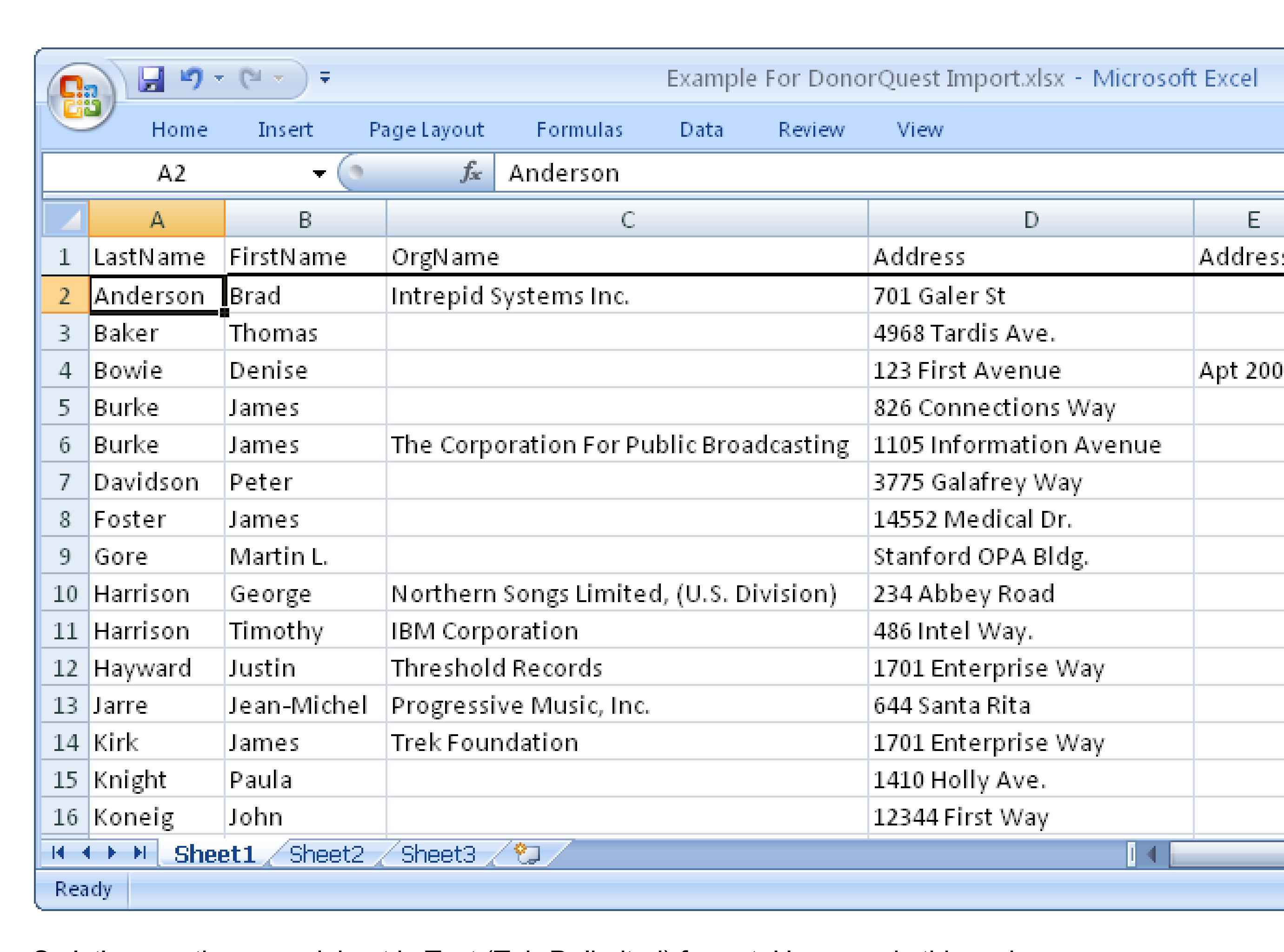
Log Of Decisions Made During Import

As DonorQuest performs an import, it provides a status display of records processed, updated, appended, etc. DonorQuest also writes details of the decisions it makes during an import to a log file. This file is located in your \DQuest\ folder and is named ImpLog.txt. It is a standard text file, so you may open it using any standard text editor, such as the NotePad program included with Windows. DonorQuest allows easy viewing of this file by clicking on File, Open, The Import Log.

12.2 Preparing An Excel File For Import

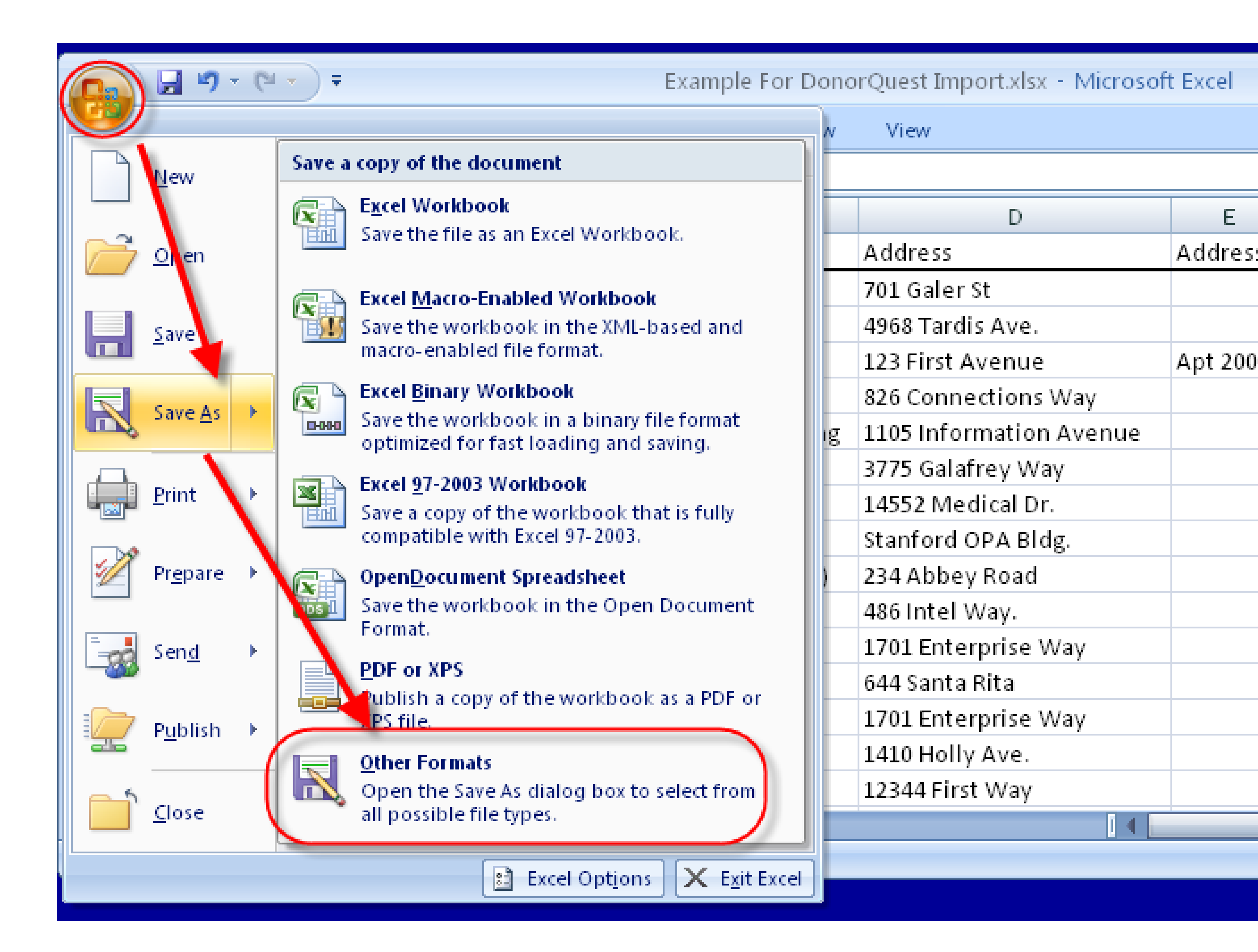
An example Excel spreadsheet is included with your DonorQuest installation named, "Example For DonorQuest Import.xlsx." It is located in your \DQuest\ folder, and is included so that you may practice saving an Excel file out to a standard Tab-Delimited text file, which is then compatible with the DonorQuest import. If you are using the online version of DonorQuest, you may download the sample file to your computer using this link: www.DonorQuest.com/downloads/ExampleForDonorQuestImport.xlsx

The example spreadsheet looks like this:

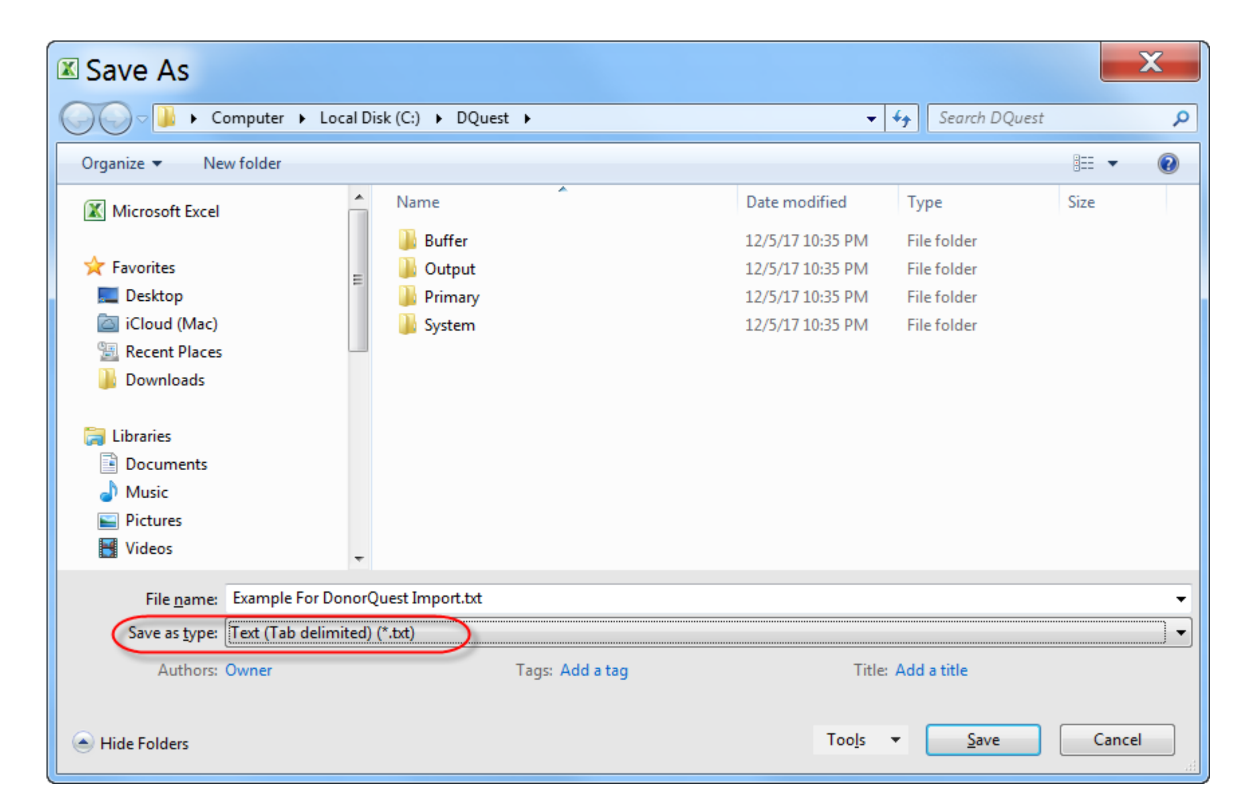


	LastName	FirstName	OrgName	Address	Addres
2	Anderson	Brad	Intrepid Systems Inc.	701 Galer St	
3	Baker	Thomas		4968 Tardis Ave.	
4	Bowie	Denise		123 First Avenue	Apt 200
5	Burke	James		826 Connections Way	
6	Burke	James	The Corporation For Public Broadcasting	1105 Information Avenue	
7	Davidson	Peter		3775 Galafrey Way	
8	Foster	James		14552 Medical Dr.	
9	Gore	Martin L.		Stanford OPA Bldg.	
10	Harrison	George	Northern Songs Limited, (U.S. Division)	234 Abbey Road	
11	Harrison	Timothy	IBM Corporation	486 Intel Way.	
12	Hayward	Justin	Threshold Records	1701 Enterprise Way	
13	Jarre	Jean-Michel	Progressive Music, Inc.	644 Santa Rita	
14	Kirk	James	Trek Foundation	1701 Enterprise Way	
15	Knight	Paula		1410 Holly Ave.	
16	Koneig	John		12344 First Way	

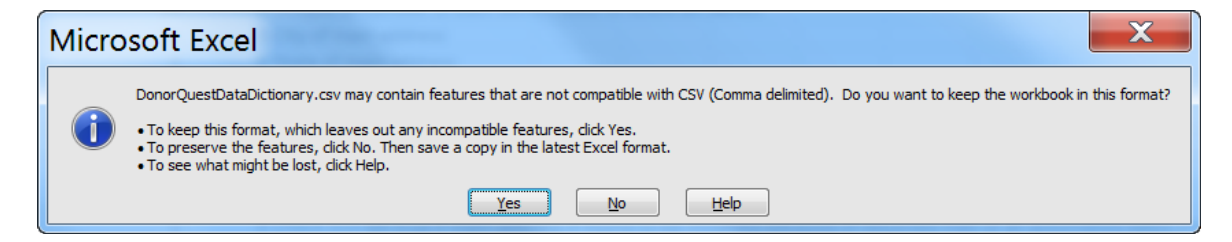
So let's save the spreadsheet in Text (Tab-Delimited) format. How you do this varies depending on your version of Excel (and we all know Microsoft loves to change where features are to make things look "new"), here is how you do it in the version of Excel included with Office 2007:



From the Other Formats menu, choose Text (Tab delimited) (*.txt) for the Save As Type, and accept the file name as it is (it will be the same as the spreadsheet file name, but with a txt extension). It will look about like this:



Click the Save button on the Save As window. Excel will show you the following confirmation dialog:



This is simply saying that nothing fancy in the spreadsheet (like pictures or graphs) will be saved in the output file -- only textual, numeric, and date values will be written out from the active sheet -- which is what we want. Click Yes. Despite the confusing language, this will not affect the spreadsheet you have open, it only applies to the new file being created.

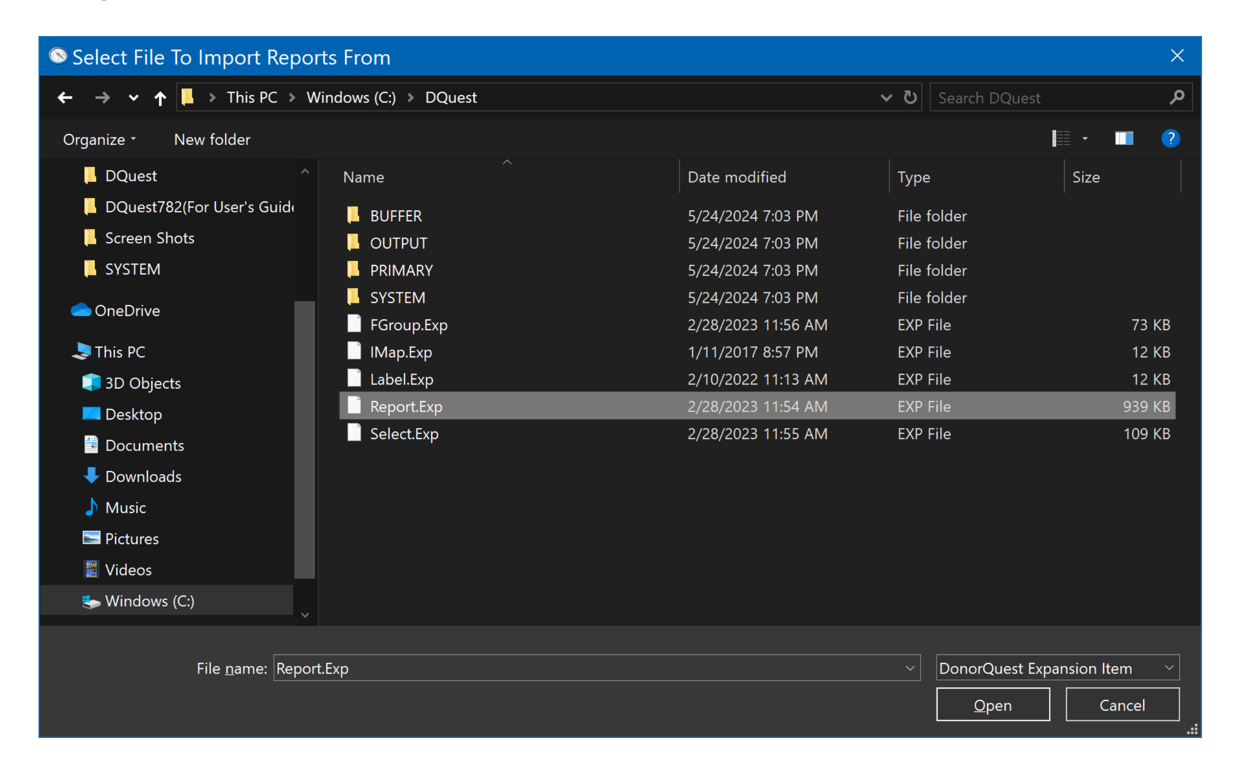
Now, finally you should have a standard tab-delimited file you can import directly into DonorQuest using the File, Import, Donor Data option.

12.3 Report Layouts

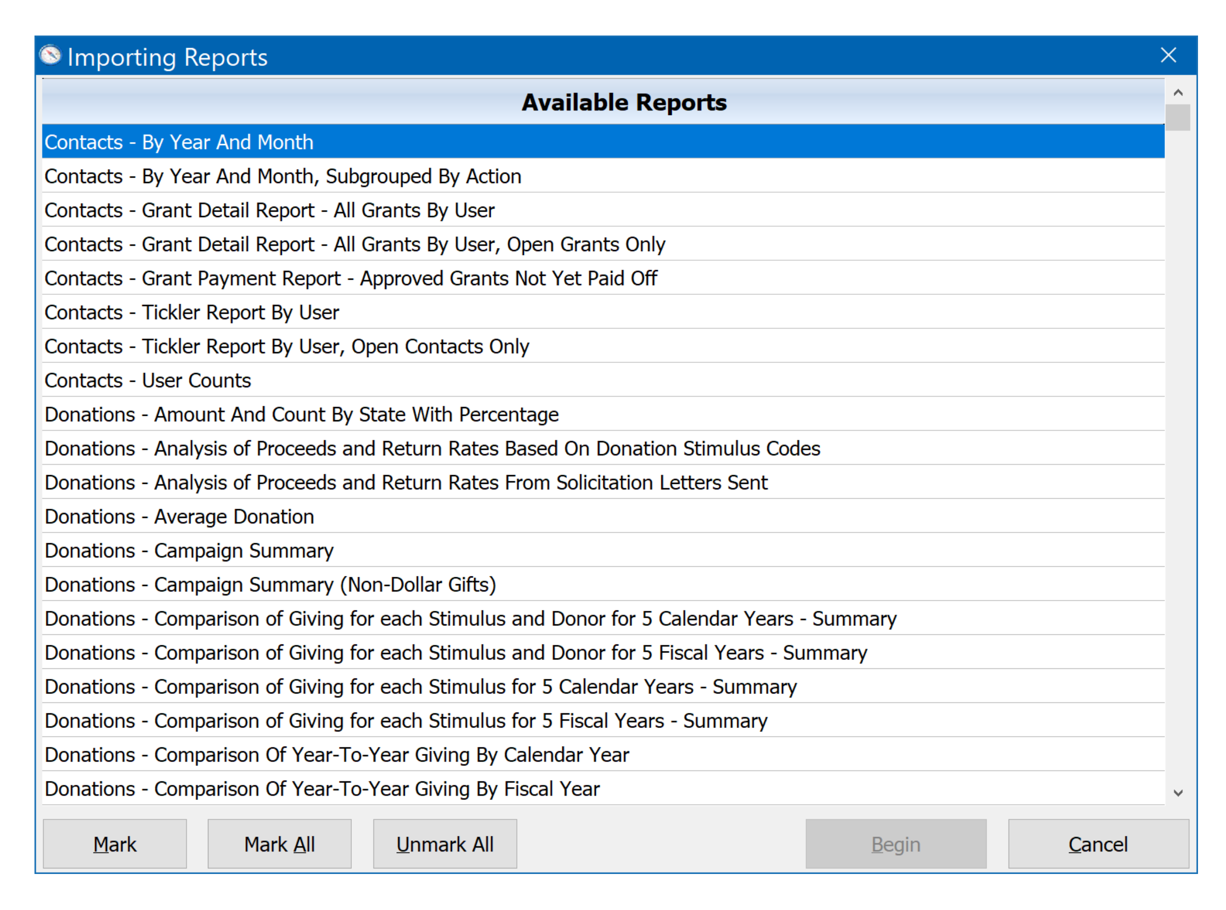
While DonorQuest comes with over 500 pre-defined report layouts, there may be times when you need a specialized layout created by a DonorQuest user at another organization, or by our support department. In either case you will likely receive the report layout as an email attachment or website download. The file will be a special DonorQuest Report Layout file which may contain one or more report layouts for you to choose from.

The file attachment will normally have a .exp extension, which is short for Expansion file. This file extension is used for all DonorQuest component objects including Report layouts, Label layouts, Field Groups, and Selection Definitions.

A copy of all the pre-defined DonorQuest reports is stored in the Report.exp file, located directly in your \DQuest\ folder. While importing report layouts from this file will have no effect since the reports already exist in DonorQuest, it is a way to see how the import process works. Click on File, Import, Report Layouts. The report import file selection dialog will appear, which looks like this:



It will likely open in the \DQuest\ folder, but may open elsewhere if you have been working in other folders. Navigate to the \DQuest\ folder if necessary, highlight the Report.exp file, then click Open. This will open the Report.exp file, offering you a menu of all the report layouts it contains which should look like this:



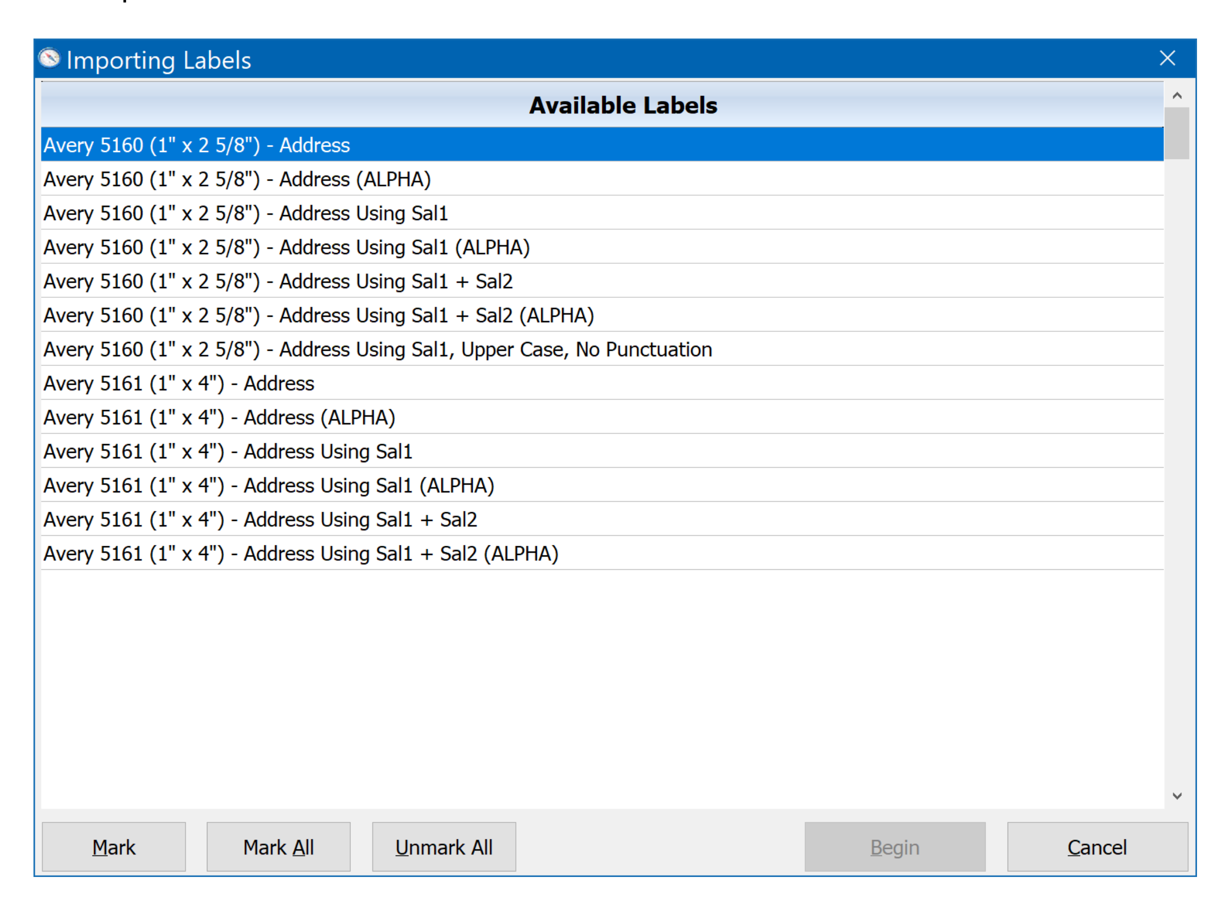
At this point you can mark the report layout(s) you want to import, then click the Begin button. If you are importing custom report layouts from a file sent to you by another organization using DonorQuest, or by DonorQuest Support, then of course you will need to open that file instead, and the menu you see will reflect only the report layouts of that file. It may only have one report layout in it. Also, any custom report layouts you import will be shown on the User-Defined Report Layouts tab of the report print window in DonorQuest, keeping them separate from the stock report layouts we have. The Mark button will mark the currently highlighted report for import, allowing you to import only specific reports. The Mark All button will mark all reports for import.

12.4 Label Layouts

As with Report Layouts, you may import custom Label Layouts created by DonorQuest users at other organizations, or sent to you by DonorQuest support. Files containing DonorQuest expansion items will have an exp file extension.

Copies of all the pre-defined DonorQuest Label Layouts are stored in the Label.exp file, located directly in your \DQuest\ folder. While importing label layouts from this file will have no effect since the layouts already exist in DonorQuest, it is a way to see how the import process works. Click on File, Import, Label Layouts. The report import file selection dialog will appear. Navigate to your \DQuest\ folder if necessary, highlight the Label.exp file, and

click Open. You should see:

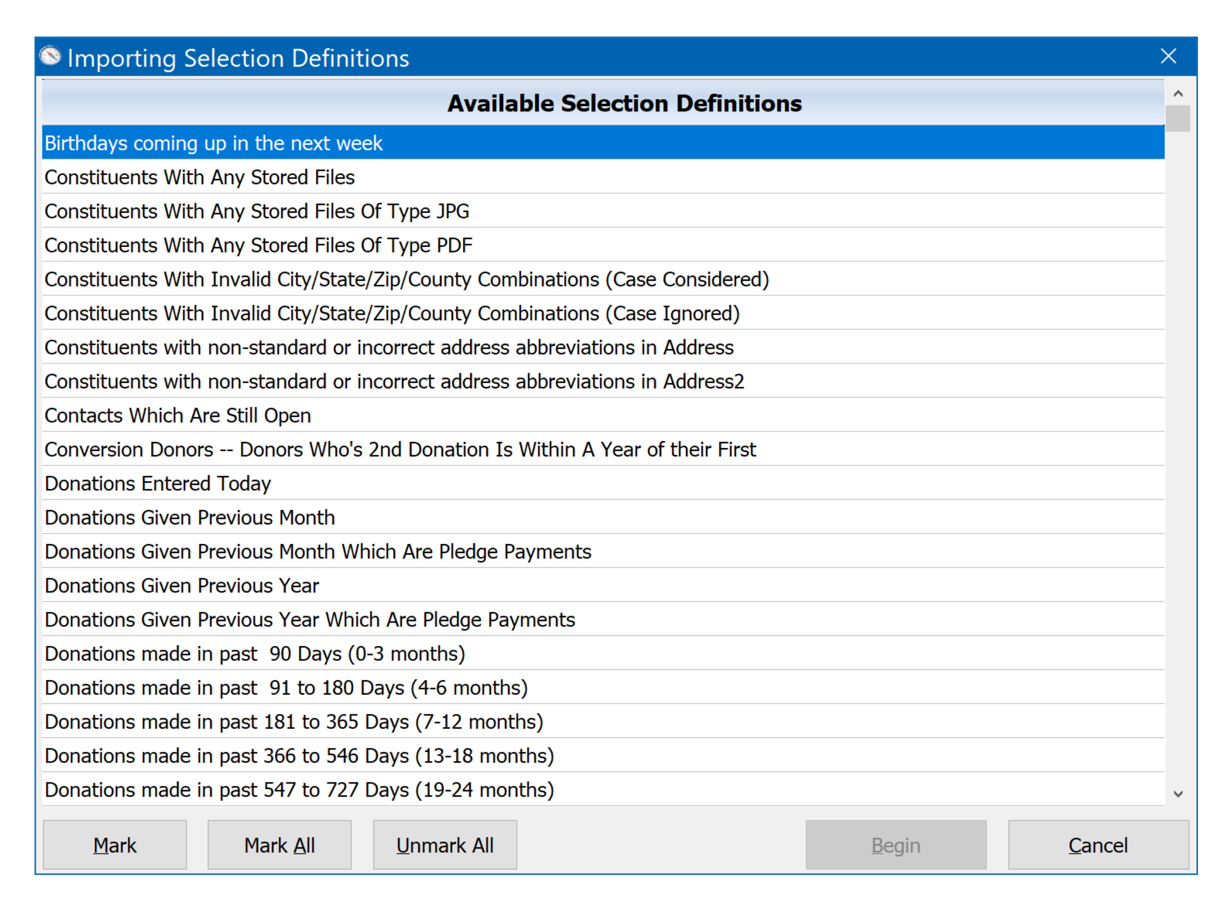


At this point you can mark the label layout(s) you want to import, then click the Begin button. If you are importing custom label layouts from a file sent to you by another organization using DonorQuest, or DonorQuest Support, then of course you will need to open that file instead, and the menu you see will reflect only the label layouts of that file. It may only have one label layout in it. Also, any custom label layouts you import will be shown on the User-Defined Label Layouts tab of the label print window in DonorQuest. The Mark button will mark the currently highlighted label for import, allowing you to import only specific reports. The Mark All button will mark all labels for import.

12.5 Selection Definitions

As with Report and Label Layouts, you may import custom Selection Definitions created by DonorQuest users at other organizations, or sent to you by DonorQuest support. Files containing DonorQuest expansion items such as this will have an exp file extension.

Copies of all the pre-defined DonorQuest Selection Definitions are stored in the Select.exp file, located directly in your \DQuest\ folder. While importing selection definitions from this file will have no effect since the layouts already exist in DonorQuest, it is a way to see how the import process works. Click on File, Import, Selection Definitions. The selection definition import file dialog will appear. Navigate to your \DQuest\ folder if necessary, highlight the Select.exp file, and click Open. You should see:



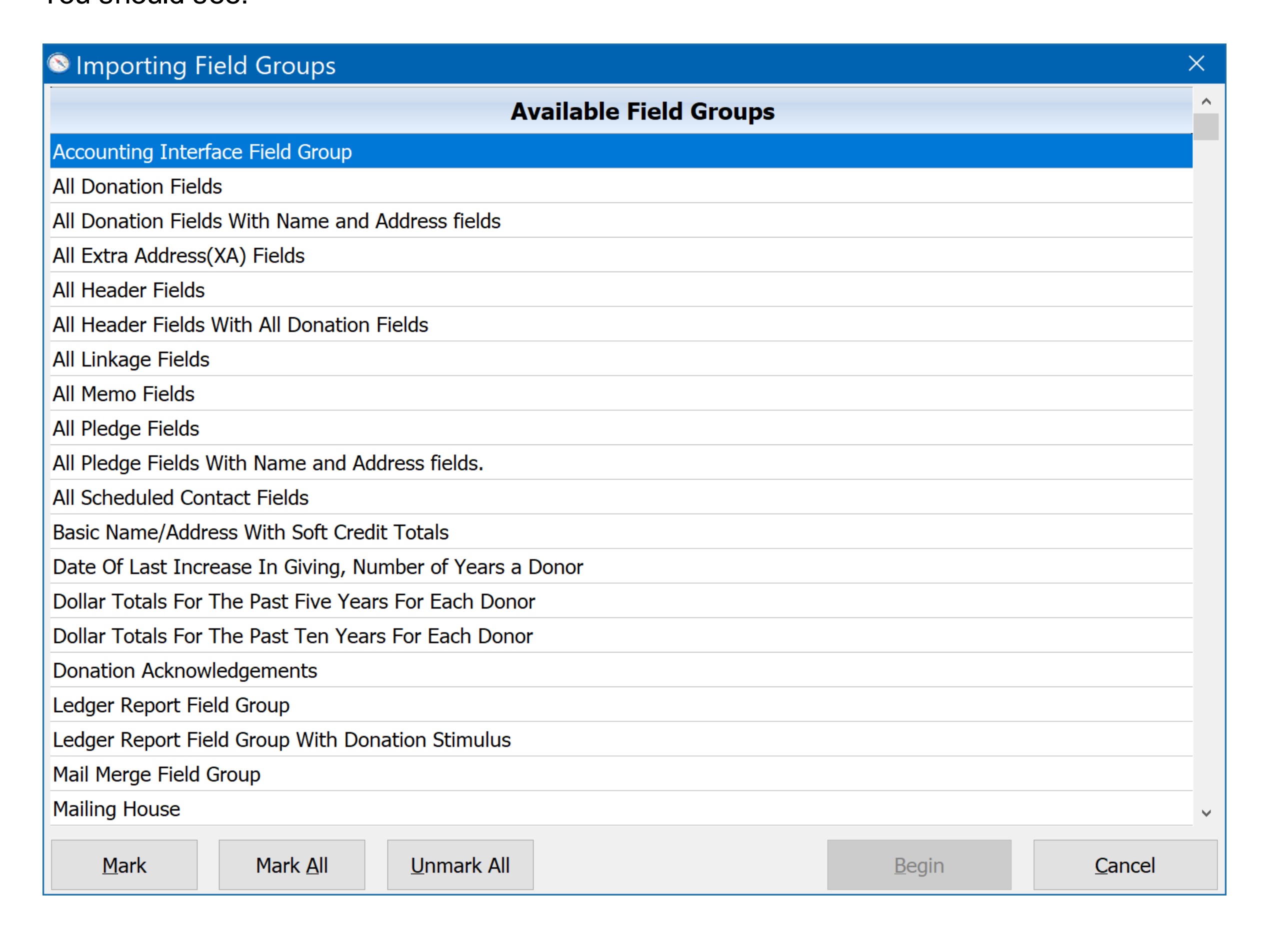
At this point you can mark the definition(s) you want to import, then click the Begin button. If you are importing selection definitions from a file sent to you by another organization using DonorQuest, or DonorQuest Support, then of course you will need to open that file instead, and the menu you see will reflect only the selection definitions in that file. It may only have one selection definition in it. Also, any custom selection definitions you import will be shown on the User-Defined tab of the Creating A Selection window in DonorQuest. The Mark button will mark the currently highlighted selection definition for import, allowing you to import only specific reports. The Mark All button will mark all selection definitions for import.

12.6 Field Groups

As with the other DonorQuest Expansion Items, you may import custom Field Groups created by DonorQuest users at other organizations, or sent to you by DonorQuest support. Files containing DonorQuest expansion items will have an exp file extension. Field Groups in DonorQuest are used for data exports, and for direct data transfer to Excel. Each field group is basically a list of fields, though formulas can also be used in Field Groups. Please refer to the Field Group topic for information on how to use field groups.

Copies of all the pre-defined DonorQuest Field Groups are stored in the FGroup.exp file, located directly in your \DQuest\ folder. While importing Field Groups from this file will have no effect since the groups already exist in DonorQuest, it is a way to see how the import process works. Click on File, Import, Field Groups. The Select File dialog will appear.

Navigate to your \DQuest\ folder if necessary, highlight the FGroup.exp file, and click Open. You should see:



At this point you can mark the selection definition(s) you want to import, then click the Begin button. If you are importing custom selection definitions from a file sent to you by another organization using DonorQuest, or DonorQuest Support, then of course you will need to open that file instead, and the menu you see will reflect only the definitions in that file. It may only have one label layout in it. Also, any custom selection definitions you import will be shown on the User-Defined filter tab of the Creating A Selection window in DonorQuest. The Mark button will mark the currently highlighted field group for import, allowing you to import only specific reports. The Mark All button will mark all field groups for import.

12.7 Import Mappings

Import mappings are a little different than other DonorQuest Expansion Items because they correspond to the record layouts of the various external data files you or others may have worked with in the past. When you import donor data into DonorQuest from an external file, you must create a field mapping which explains to DonorQuest how the imported data is to be applied to the internal DonorQuest data fields. If you are importing data sent to you by a mailing house, DonorQuest Support, or even one of your satellite offices, they may include a DonorQuest Import Mapping with the actual data file. When they do, this will save you time in doing the import because once you add the Import Mapping to DonorQuest, it will know just how to process the data file.

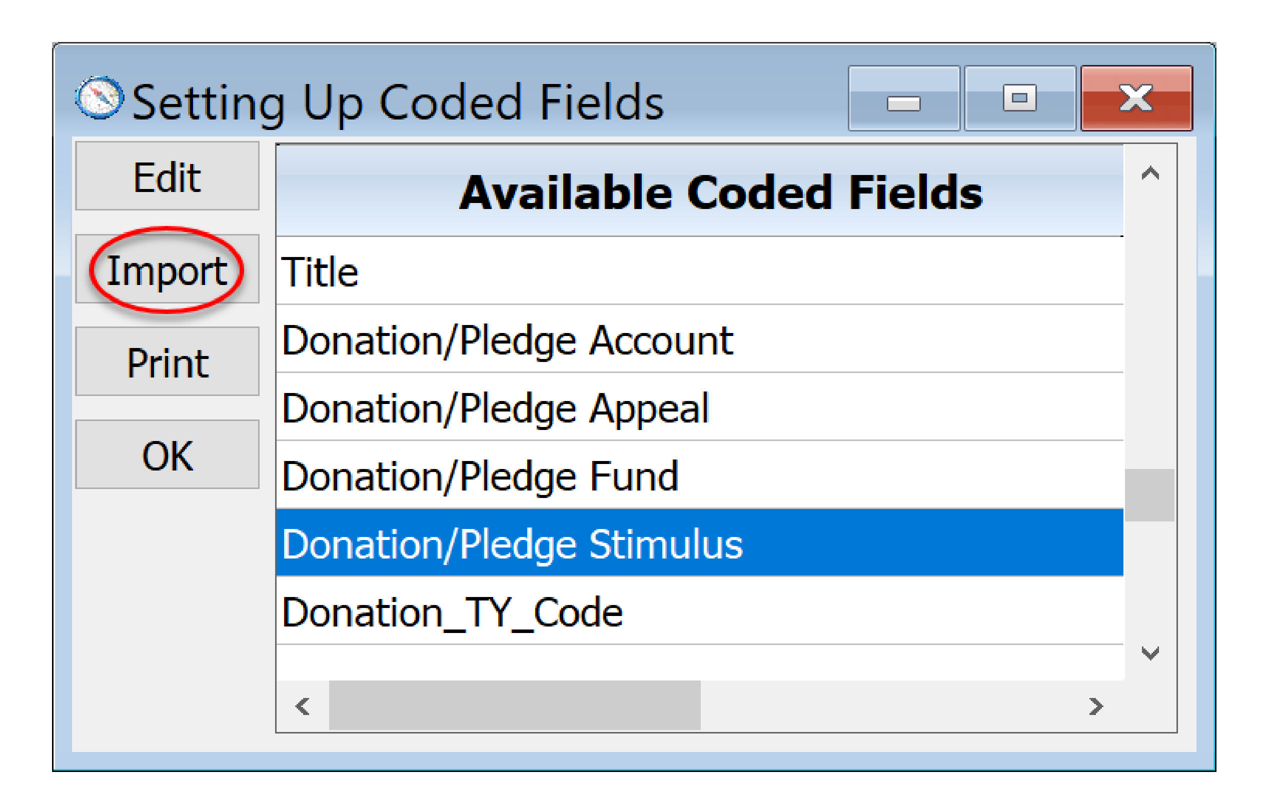
To bring a new Import Mapping into DonorQuest, click on File, Import, Import Mappings. The Select File dialog will appear. Navigate to the folder containing the import mapping file you have been sent, highlight the file, and click Open. You should then see a window showing all the Import Mappings contained in the file. Use the Mark button to mark the ones you need, then click the Begin button. The Import Mappings you added will now be available for use when doing a DonorQuest Donor Data import.

12.8 Code Tables

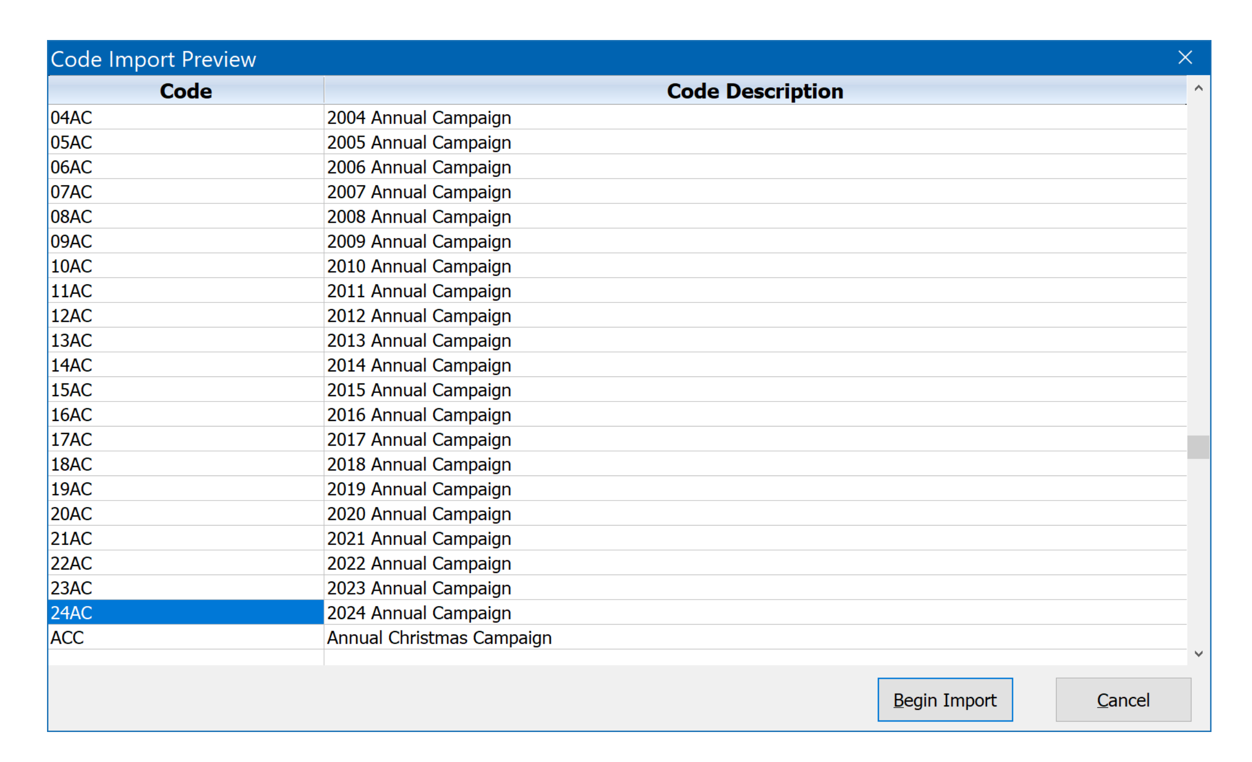
Many of the fields within DonorQuest are coded fields. They can store anywhere from a 1 to 20 character alphanumeric code depending on the field. These codes are completely user-definable, and they are typically used to track standard information about each donor account. Codes facilitate consistent data entry by all users, since they are all working from the same list of valid codes created and agreed upon by the decision makers in your organization. For example, if it is decided that the donations for your 2017 annual campaign are to all have a Donation Stimulus code of 17AC, then you would create a new Donation Stimulus code 17AC (along with a meaningful one-line description of what the code means), and DonorQuest would then allow 17AC as one of the valid codes for Donation Stimulus. DonorQuest would also display 17AC and it's description on a drop-down list of valid code for Donation Stimulus during data entry so that users do not have to know what the valid codes are for Donation Stimulus, though if they do they can also type them directly when adding a new donation.

Sometimes mailing houses will become very involved in your campaigns well beyond just doing your mailings. They will establish Donation Stimulus codes which they need you to use in recording donations from the mailings they do for you. Depending on the mailing house, these code may be very detailed and can number in the hundreds. In these cases, the mailing house will provide the code and code descriptions to you in a standard comma-separated (CSV) or tab-delimited text (TXT) file. These files can be imported directly into the internal DonorQuest code tables, so that they will be immediately available for use as the donations start coming in.

A code import file must consist of two columns containing the Code, and Code Description, in that order. To import a code table, click on File, Import, Codes. This will open the Setting Up Coded Fields window, which looks like this:



This is the same place you would go to manually add and edit codes via the Edit button. But to import codes, you first want to highlight the name of the coded field you have a code import for, then click the Import button of the Setting Up Coded Fields window. For a mailing house code import, this will typically be the Donation/Pledge Stimulus code table. Once you have the desired code table highlighted, click on the Import button. This will open a file selection window in which you may find and open the file containing the codes you were sent. Once you click Open, DonorQuest will ready the file and show you a preview of the codes and code descriptions is contains. It should look something like this:



Be sure code and code descriptions are in the correct columns. If it all looks good, then click on Begin Import to bring the codes into DonorQuest.

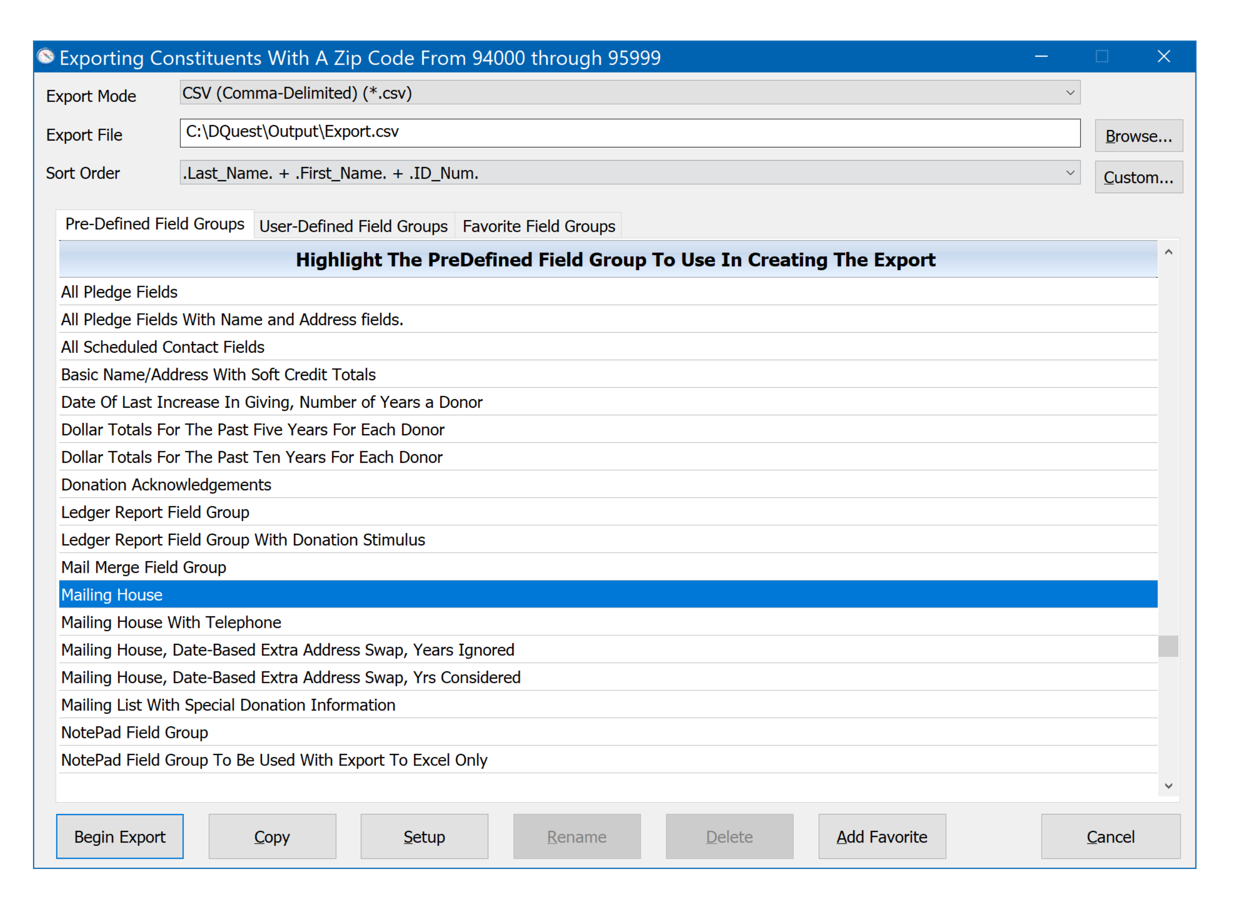
Topic XIII

13 Exporting

The process of exporting means to send information out of DonorQuest for use by other software programs such as Microsoft Excel or Access, or even other installations of DonorQuest itself. The information sent out can be donor information, as well as DonorQuest-specific components such as Report or Label Layouts and Field Groups which you may have created and would like to share with DonorQuest users at other locations. Donor information can be exported to standard Comma-Separated Value (CSV) files, or Tab-Delimited Text (TXT) files. DonorQuest component objects such as report layouts, label layouts, field groups, and selection definitions all use a special DonorQuest file format with the EXP file extension, which is short for Expansion file.

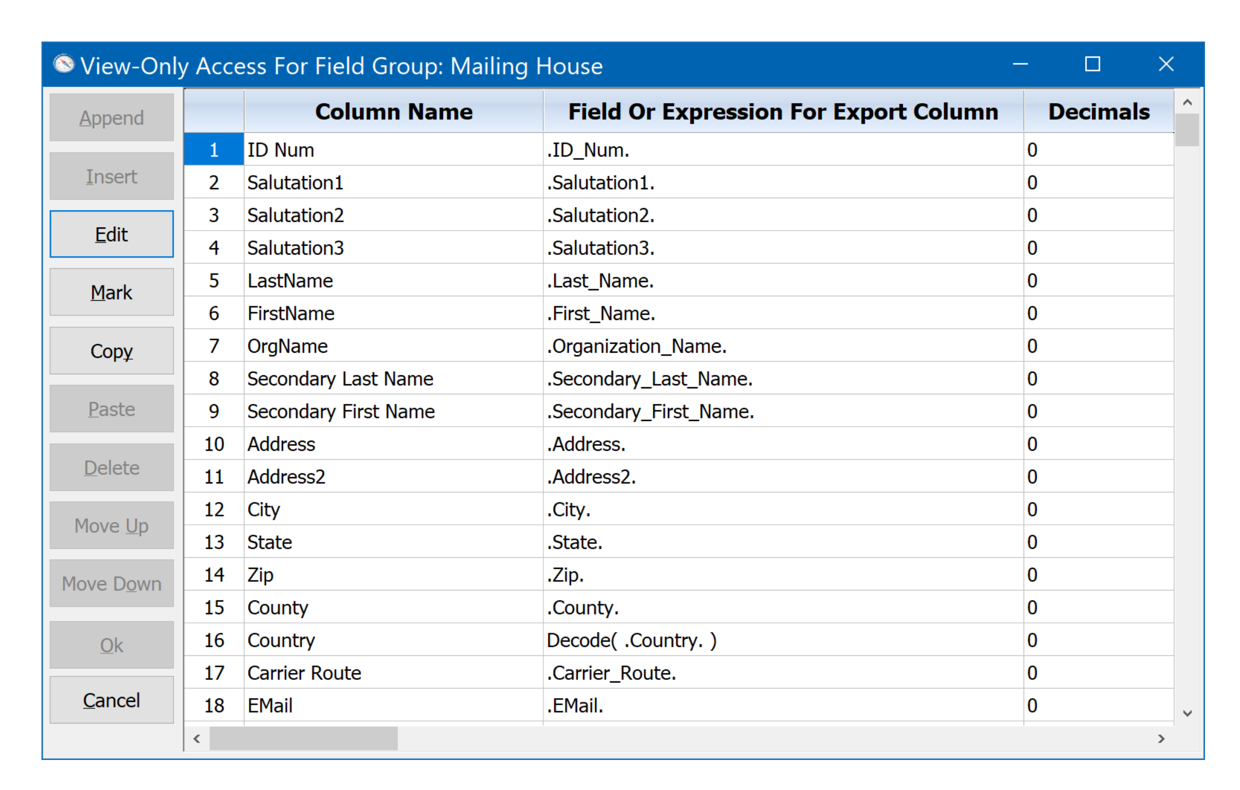
13.1 Donor Data To A File

There are many reasons you may want to export donor data out of DonorQuest such as for preparation of a mail merge letter, sending to a mailing house, or to have Zip+4 processing and address cleanup done on your data. With DonorQuest, you can export to a standard comma-separated value (CSV) or tab-delimited text (TXT) file. You may also export data directly to Excel. Before you can perform an export you need to run a DonorQuest Selection to gather together the specific information you want to export. Once you have a Selection Result to export, click on the Export button of the Selection Results window. We will use the sample zip code range selection we created in the topic on the Range Selection Filter. When you click the Export button, you will see the DonorQuest Export window open. You will see the name of the selection we are using appear in the title of the export window, so we know we are exporting the desired selection. Go ahead and set the following options:



Here we are saying that we want to write the data out to a file in the DonorQuest output folder named Example.csv. If you wish to create the export file in a different folder, click on the Browse button to the right of the Export File and choose the destination folder you prefer. The export mode is set to CSV, so the file will be in the standard comma-separated value format which is compatible with most software. Lastly, we are highlighting the Mailing House field group. The selection determines which donors are exported, and the field group we choose here determines what information about each donor is written out. To see which exact fields a specific field group contains, you may click on the Setup button with the field group highlighted. Since the Mailing House field group is a pre-defined field group provided with DonorQuest, you may view the Setup for it, but you can't make any changes, so DonorQuest will display a brief message to that effect before allowing you to see how the group is setup.

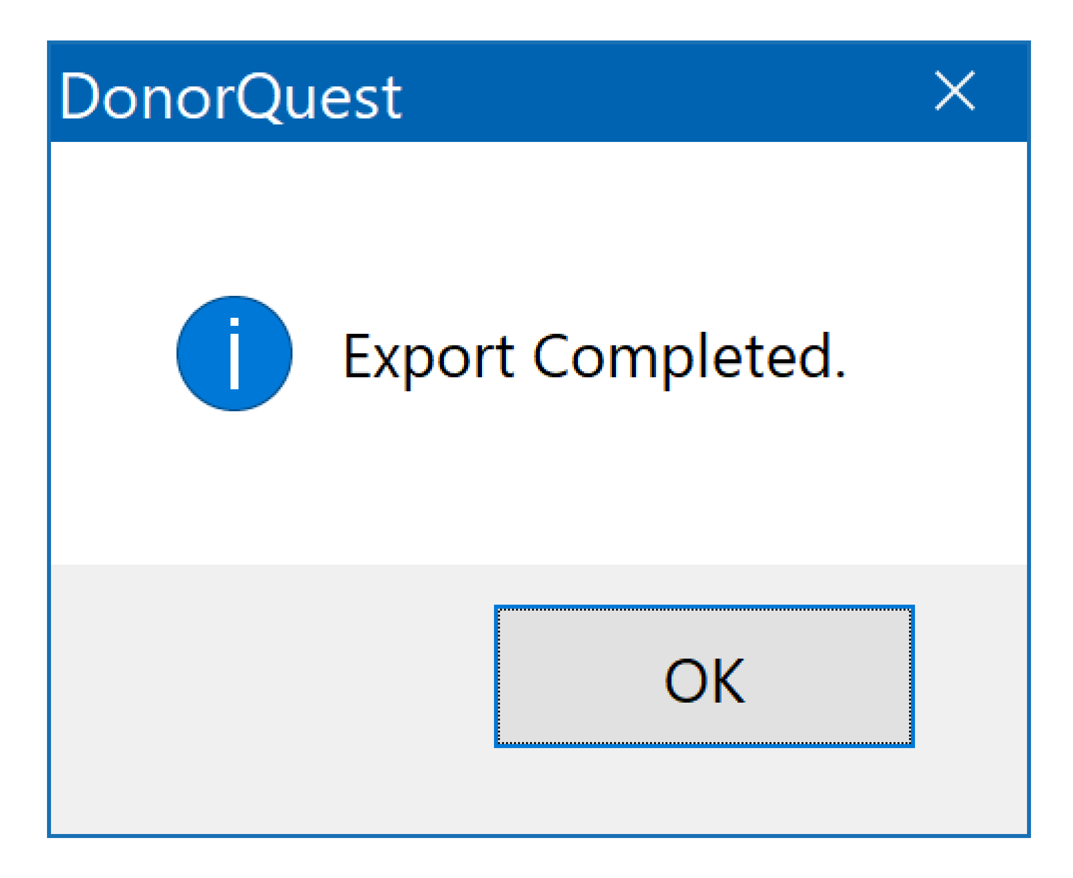
So, before doing the export, highlight the Mailing House field group, click on the Setup button, and click OK on the message about not being able to make any changes. You should see:



	Column Name	Field Or Expression For Export Column	Decimals
1	ID Num	.ID_Num.	0
2	Salutation1	.Salutation1.	0
3	Salutation2	.Salutation2.	0
4	Salutation3	.Salutation3.	0
5	LastName	.Last_Name.	0
6	FirstName	.First_Name.	0
7	OrgName	.Organization_Name.	0
8	Secondary Last Name	.Secondary_Last_Name.	0
9	Secondary First Name	.Secondary_First_Name.	0
10	Address	.Address.	0
11	Address2	.Address2.	0
12	City	.City.	0
13	State	.State.	0
14	Zip	.Zip.	0
15	County	.County.	0
16	Country	Decode(.Country.)	0
17	Carrier Route	.Carrier_Route.	0
18	EMail	.EMail.	0

As with reports in DonorQuest, it is possible to create custom versions of the stock field groups provided with DonorQuest, so that you may specify exactly which columns you would like the export file to have. To do this, use the Copy button on the export dialog to copy the stock field group which is closest to what you want. Then click the Setup button on the copy you made to customize it.

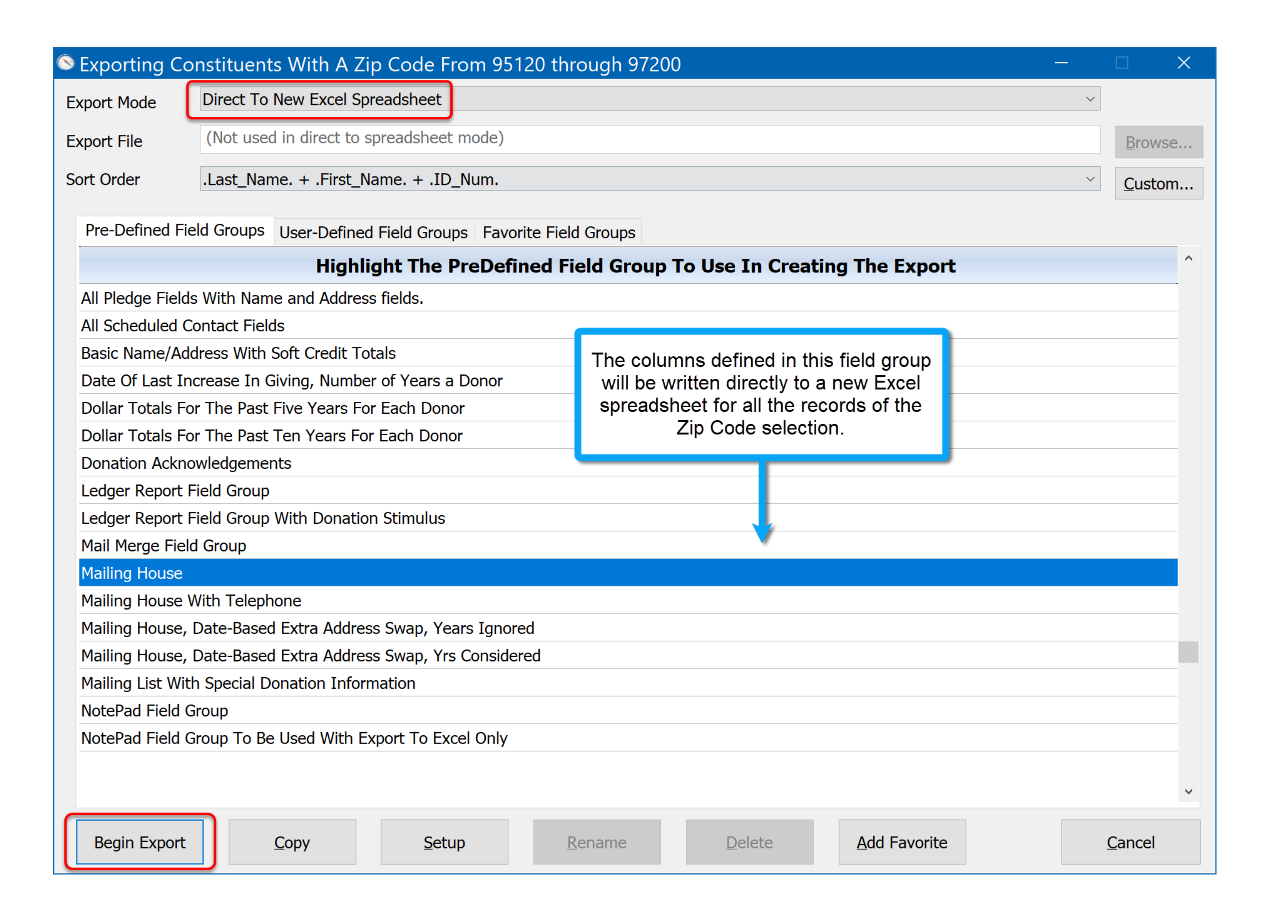
If we use the stock Mailing House field group, then the columns shown above are the data columns which will be written to the export file, for each record in the selection result. Click Cancel, then perform the export by clicking on the Begin Export button of the export window. You should see the following confirmation that the export has been completed:

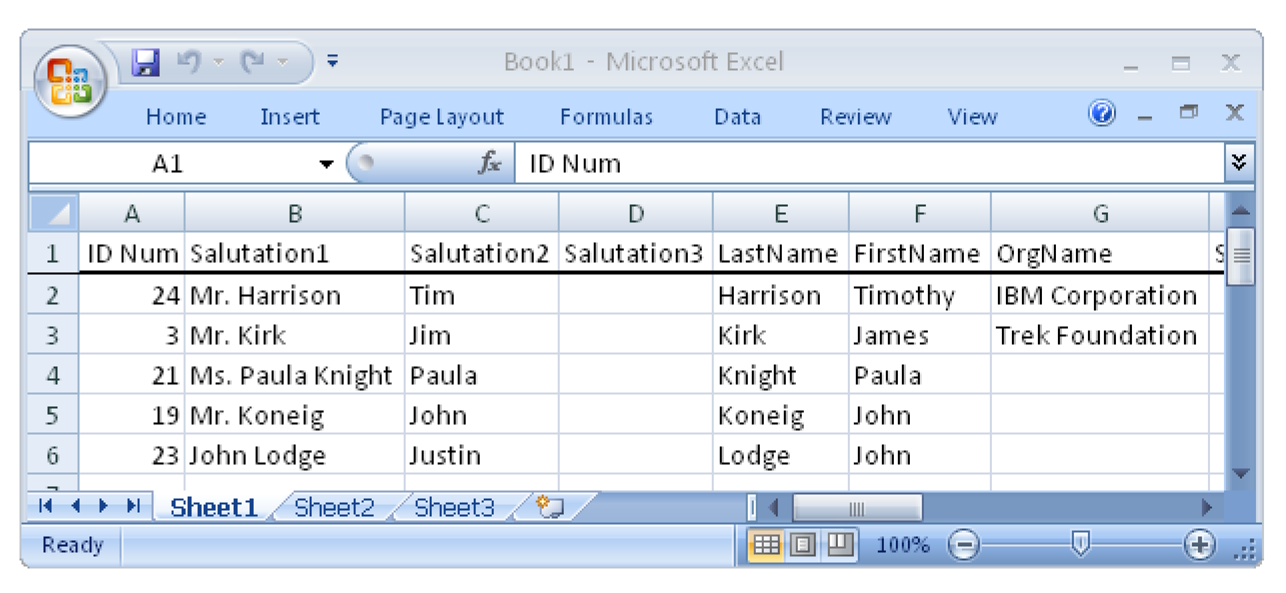


If you followed the example above, the data file, Example.csv, will be in your \DQuest\Output\ folder. You may email this file, open it in another program, etc.

13.2 Donor Data Directly To Excel

Very commonly, you will want to export data directly to Excel. DonorQuest has the ability to do this directly without the need for an intermediate file which you then have to import to Excel. So, for the example shown in the previous topic on exporting directly to a file, if we simply change the Export Mode to "Direct To New Excel Spreadsheet" (or Direct To Calc for the online version of DonorQuest), then when we click on the Begin Export button, Excel (or Calc) will open automatically with a new spreadsheet containing or zip code selection, and the columns specified in the Mailing House field group. It should all look like this:



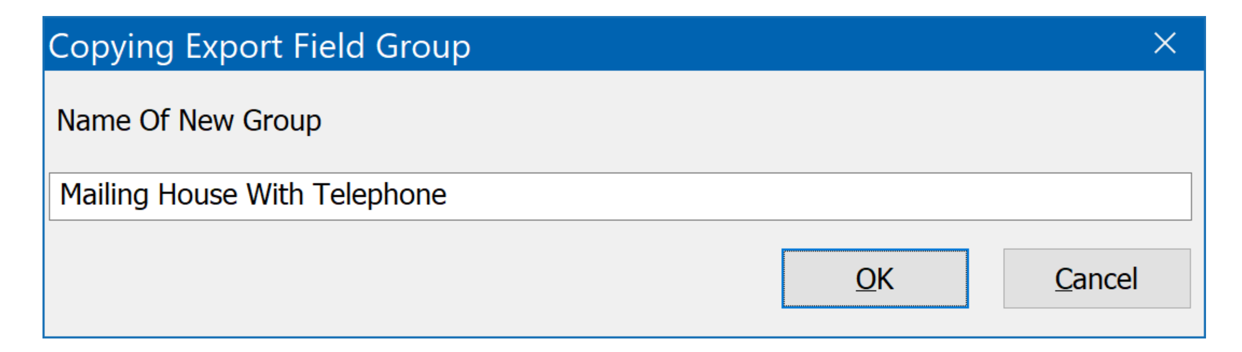


	A	B	C	D	E	F	G
1	ID Num	Salutation1	Salutation2	Salutation3	LastName	FirstName	OrgName
2	24	Mr. Harrison	Tim		Harrison	Timothy	IBM Corporation
3	3	Mr. Kirk	Jim		Kirk	James	Trek Foundation
4	21	Ms. Paula Knight	Paula		Knight	Paula	
5	19	Mr. Koneig	John		Koneig	John	
6	23	John Lodge	Justin		Lodge	John	

Note that due to the overhead involved in communicating directly with Excel, this method of export should only be used for smaller exports of a few thousand records or less. For large exports, the direct to file method is preferred.

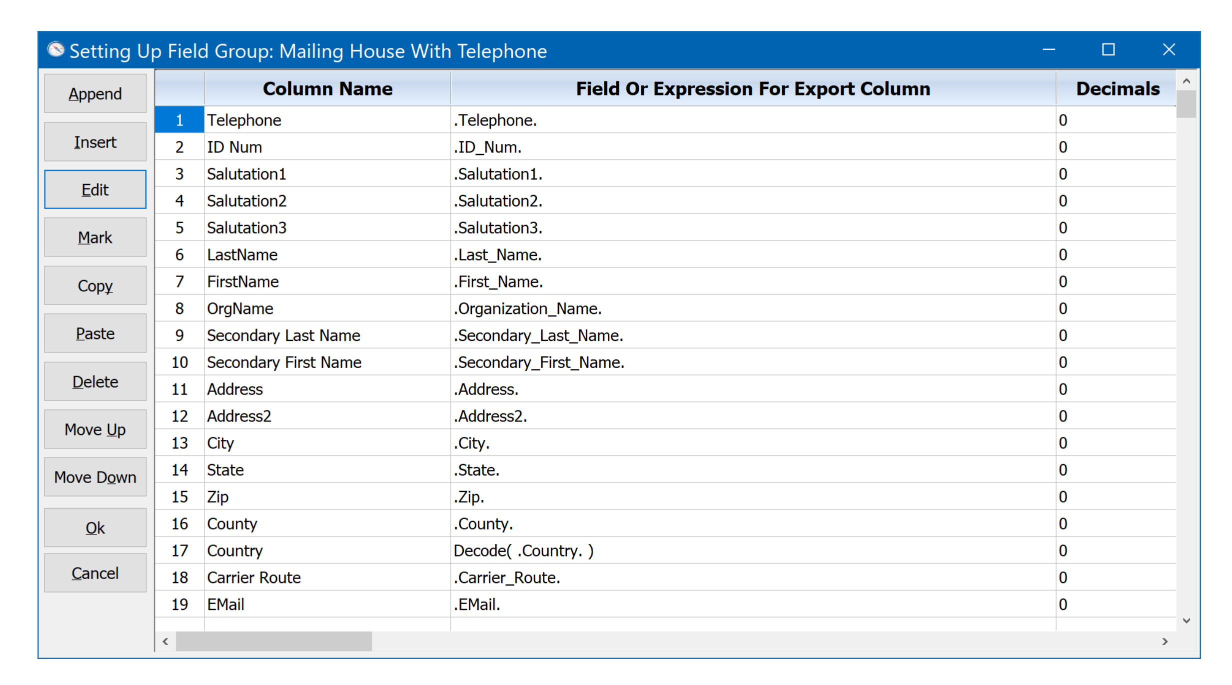
Creating A Custom Field Group

Let's say that the pre-defined field group, "Mailing House", is very close to having all the columns you need, but you would like to include the primary telephone number. You can accomplish this by creating a custom field group, using the Mailing House group as a starting point. To do this, go to the point of exporting as shown in the above example with the Export dialog open. Highlight the Mailing House field group again, but this time click on the Copy button of the Export window, and enter the following for the name of your new custom field group:



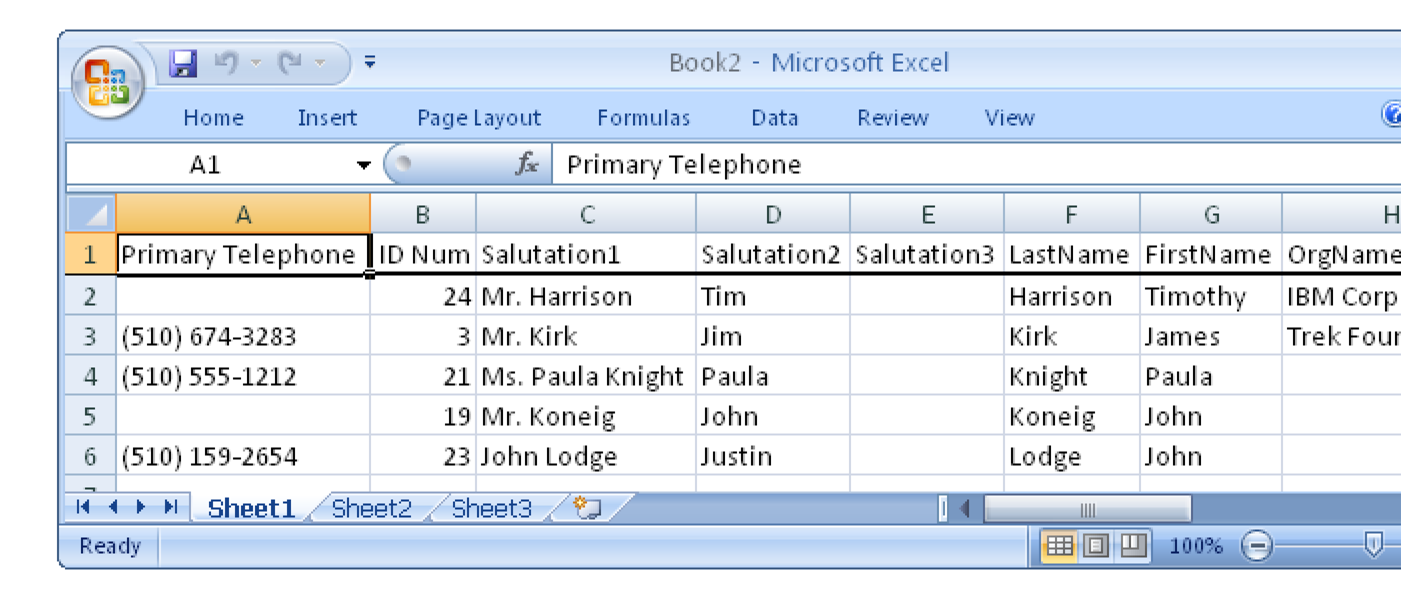
Click OK. You will see the new field group appears under the User-Defined Field Groups tab of the Export window. Now click on the Setup button. This time DonorQuest will open the field group setup window with no limitations. You may add the telephone field by clicking the Append button, and simply choosing it from the pop-up field menu.

You may use the Move Up and Move Down buttons if you have a preference as to where you want the telephone to appear in the left-to-right column order of the export. When you are ready, click OK on the field group setup to save the changes to our new custom field group:



	Column Name	Field Or Expression For Export Column	Decimals
1	Telephone	.Telephone.	0
2	ID Num	.ID_Num.	0
3	Salutation1	.Salutation1.	0
4	Salutation2	.Salutation2.	0
5	Salutation3	.Salutation3.	0
6	LastName	.Last_Name.	0
7	FirstName	.First_Name.	0
8	OrgName	.Organization_Name.	0
9	Secondary Last Name	.Secondary_Last_Name.	0
10	Secondary First Name	.Secondary_First_Name.	0
11	Address	.Address.	0
12	Address2	.Address2.	0
13	City	.City.	0
14	State	.State.	0
15	Zip	.Zip.	0
16	County	.County.	0
17	Country	Decode(.Country.)	0
18	Carrier Route	.Carrier_Route.	0
19	EMail	.EMail.	0

Finally, click on the Begin Export button of the Export window, with the settings still set for Excel. You should see Excel open again with the telephone field now included, like this:



13.3 Donor Data For Mail Merge

When preparing a merge file for a mail merge in Word, you should use the steps outlined in the topic on exporting donor data to a file. In particular, you should use the tab-delimited text (TXT) file format. Word will work directly with a file in this format to be used as the data source for your form letter. Some people prefer to export to Excel, and then do their mail merge from there, but that is actually an extra unnecessary step.

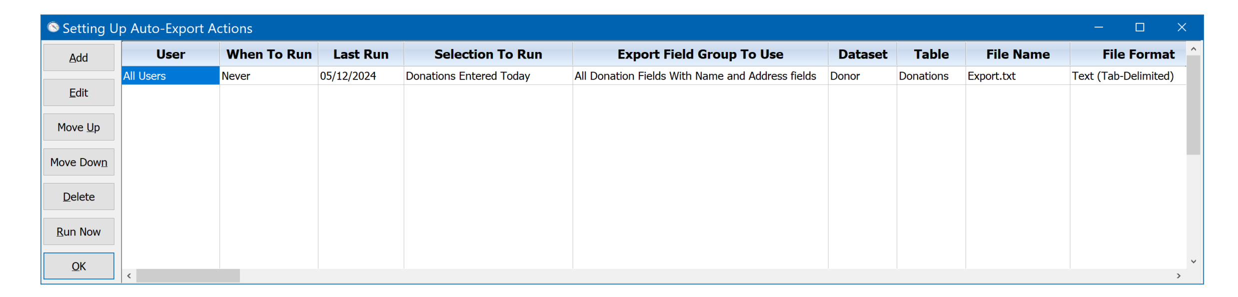
13.4 DonorQuest Component Objects

If you have any custom Report Layouts, Label Layouts, Selection Definitions, Field Groups, or Import Mappings you would like to share with DonorQuest users at other organizations (or if you need to email a definition you are working on to DonorQuest support), you can export the item(s) by clicking on File, Export, and choosing Report Layouts, Label Layouts, Selection Definitions, Field Groups, or Import Mappings. You will be shown a list of all the items of the type you selected. Simply click the Mark button to mark one or more items, then click Begin. You will be asked for a file name to write the items you have selected to. The resulting file will be very small and you can easily email it where it needs to go. The person receiving the file may then use the corresponding DonorQuest File, Import menu option to pick and choose which items of those you send they wish to bring into their DonorQuest installation. DonorQuest component objects such as report layouts, label layouts, field groups, and selection definitions all use a special DonorQuest file format with the EXP file extension, which is short for Expansion file. While admittedly .dco may have been a more appropriate extension for these files, .exp was already in broad use by the time the component object format was finalized.

13.5 Automated Export Actions

Configure, Setup Auto-Exports...

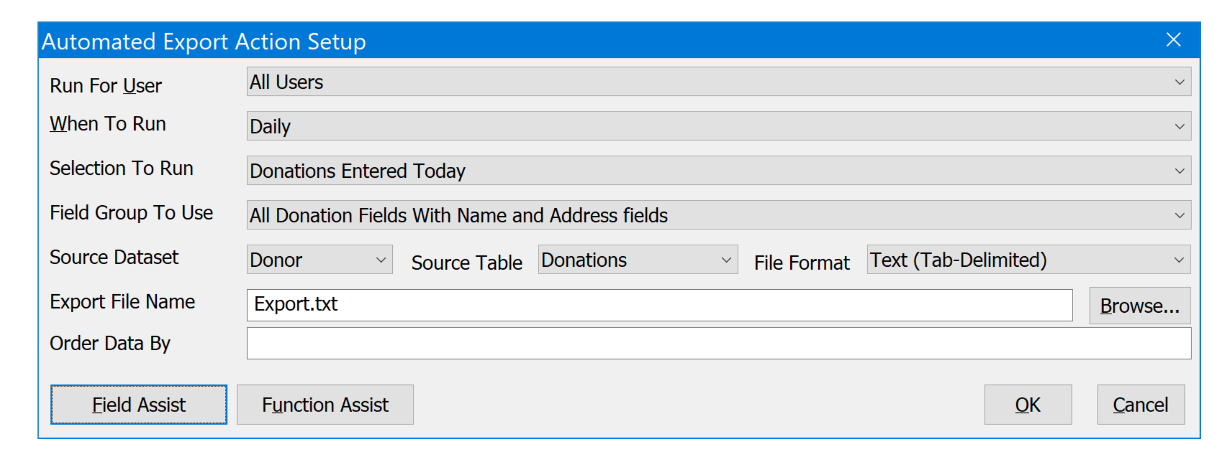
Sometimes you may need to have data exported from DonorQuest routinely and automatically. Automated Export Actions in DonorQuest allow you to specify the information to be exported, and how often to do it - daily, weekly, or monthly. You can create multiple automated export actions, each with their own schedule and content. To setup an automated export, click on Configure, Setup Auto-Exports. You should see the Auto-Export Setup dialog, which looks like this:



The above example shows an automated export of donation information which will be run on a daily basis. Specifically, the donations for the current day will be selected and exported using the field group, "All Donation Fields With Name And Address Fields." The data will be written to the file Export.txt inside the \DQuest\Output\ folder. Since this will be run everyday and the file may already exist from a previous run, DonorQuest will automatically append the date to the file name. In the above example, if today were April 27th, 2017, the actual file created would be \DQuest\Output\Export-20170427.txt.

Adding An Automated Export Action

To create a new Export Action, click the Add button. You will then see the Automated Export Action Setup dialog, which looks like this:



Run For User

In the above example, the automated daily export is done for all users. However, when a specific user wishes the export to be written to a folder which only they have access to (such as the documents folder on their computer's local drive), then the automated export can be made user-specific by choosing a user's name from the drop-down list under Run For User. That way, DonorQuest will only perform a particular export if the specific user it is intended for is logged into DonorQuest.

When To Run

This is how often the export action will be run. It can be run on a Daily, Weekly, or Monthly basis.

Selection To Run

This may be one of the many predefined selections in DonorQuest, or a custom one which you have created. It will control which records will be selected for export. In the above example, only donations for the current day are selected from among all the donations which exist. The Selection Definition, "Donations Entered Today" is provided as one of the predefined selections in DonorQuest. You can see how it is defined by clicking on File, Open Selection Definitions. You will see it on the menu. Clicking Setup will allow you to see how it is defined. You may use it or any other selection definition as a template for a new custom selection definition.

Field Group To Use

Where the Selection To Run determines which records are exported, the Field Group To Use specifies the particular data columns which will be included in the output file. In the above example, the "All Donation Fields With Name And Address Fields" field group is used. As its name implies, it will export all donation fields, along with name and address information for each donation.

Source Dataset

The Source Dataset specifies which of the three DonorQuest datasets will be accessed during the selection. All active donors and prospects are maintained in the donor dataset, so that is normally what you will use for the Source Dataset. However, it is also possible to base the selection on the archive or buffer datasets. The archive dataset is where inactive donor and prospect accounts are stored, and the buffer dataset is simply a temporary holding area where you may have placed copies of existing donor and prospect accounts.

Source Table

Each dataset has seven tables, each storing a different aspect of a donor's account data. The header table stores the main biographical information for all donors and prospects (name, address, list codes, etc.), and it is normally what you will use for the source of a selection. However, if you wish to select specific donations, pledges, memos, etc., then you may change the source table accordingly. The above example selects from the Donations table, since we wish to target specific donation records for export.

File Format

The export file may be in either Text (Tab-Delimited) or CSV (Comma-Delimited) format. Technically, the CSV format is also a text file, but commas are used to separate the data instead of a tab character, and the field data is placed within quotes. Both formats are universal and fully compatible with other software programs, including Excel. For example, they may be used directly with Word, so mail merges may be done without any conversion. They may also be opened directly by Excel.

Export File Name

In the above example, a simple file name was used which results in the export being written to the default \DQuest\Output\ folder. However, you may also specify that the file be created in a specific folder. This is done by clicking the Browse button to the right of the Export File Name blank, and navigating to the folder you wish the file to be written to. The path will then be added before the file name. If the path refers to a folder which is only available when a specific user is logged in (such as the documents folder on a specific user's computer), then the export action should be assigned to the specific user it is intended for by choosing the user's name from the drop-down list under the Run For User option.

Order Data By

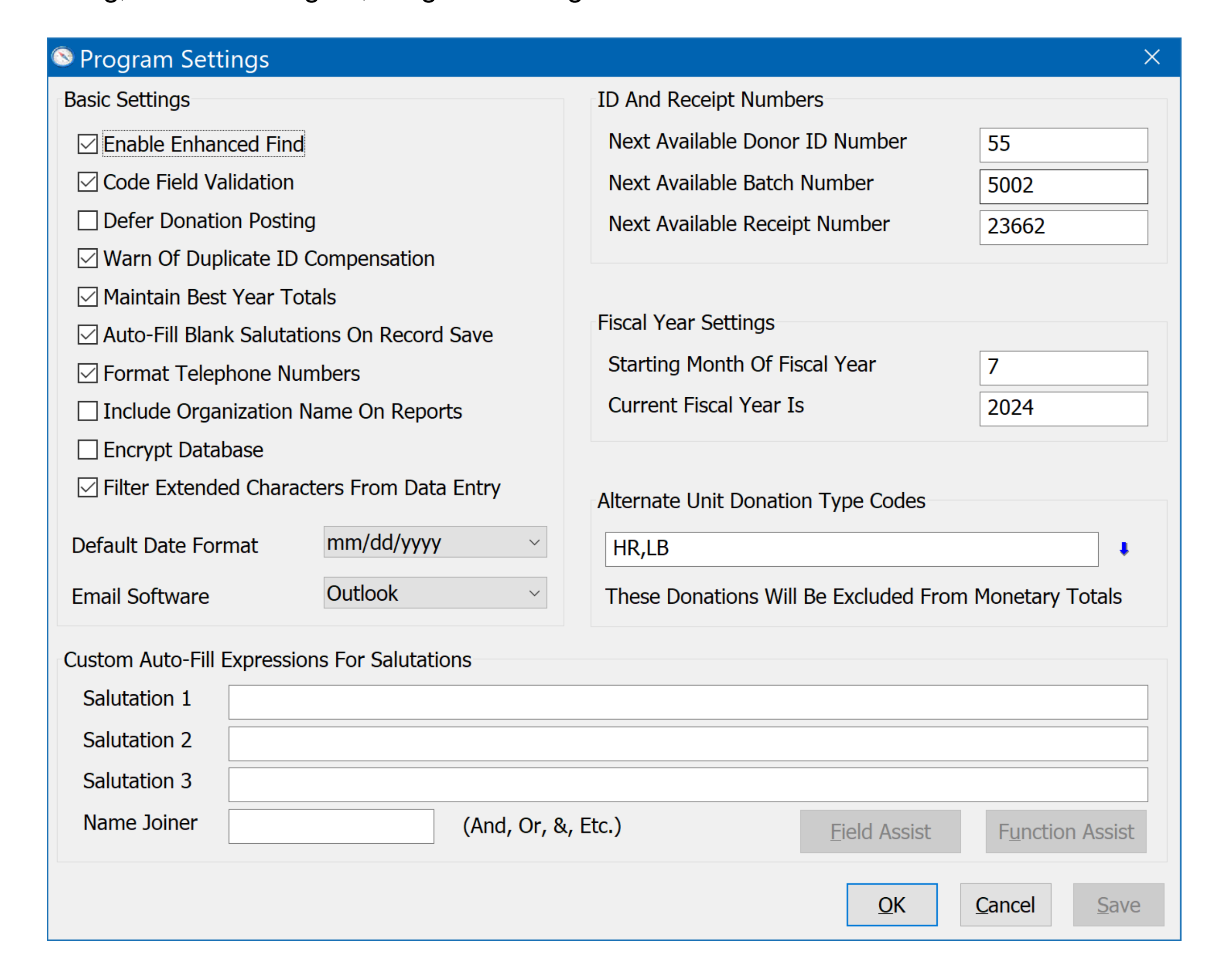
This is an optional order to place the data records in before they are written to the export file. For example, if your automated export action is exporting donation records, and you would like them to be in ordered based on the Donation Stimulus field, then you may specify this field. To do this, position the cursor in the Order Data By field, click the Field Assist button, and choose the Donation_Stimulus field.

Topic XIV

14 Program Settings

Configure, Program Settings...

Program settings allow you to turn on or off specific behaviors or features in DonorQuest. These setting are at the organization level and will apply to all users. Settings are on when they are checked and off when they are not checked. To open the Program Settings dialog, click on Configure, Program Settings. You will then see:



Following is a description of each program setting:

Enable Enhanced Find

This program setting is on by default and allows you to search within fields while doing a Find. If turned off you will still be able to search your database with the Find across fields, however DonorQuest will then only search from the left of a field rather than from within a field. Most organizations will want this switch turned on since the searching capabilities are more advanced, but for those organizations with large databases (over 200,000 donors or so) and slow in-house networks it may prove more efficient to have this switch turned off. Basically just try having it on first and then only turn it off if you need to. The online version of DonorQuest should always have this setting enabled since it has no real

limits on performance or database size.

Code Field Validation

The Code Field Validation switch specifies whether the values entered in coded fields should be validated against the pop-up code table that exists for each coded field. This option should normally be on since it guards against data entry errors.

Defer Donation Posting

DonorQuest is able to operate in either immediate or deferred donation posting mode. In immediate posting mode, donations are added to a donor's history the moment you complete the donation entry, and all donation totals are instantly updated to reflect the new donation. Also in this mode, you are able to make corrections to a donor's history by actually changing the amount (or any other attribute) of any donation within the donor's history.

In deferred posting mode, donations are not immediately added to each donor's history. Instead, they are stored in a separate posting file that temporarily stores all donations entered for all donor accounts. The newly entered donations will remain in the posting file until the donation posting operation is performed. During donation posting, all donations stored in the posting file are permanently added to the donor accounts for which they were entered. Donation posting can only be done by those users who have specifically been given the access right required to do donation posting. Deferred donation posting can be turned on at anytime. However, it can only be turned off if the posting file is empty. Please see Donation Posting for more information.

Warn of Duplicate ID Compensation

This is not needed with the online version of DonorQuest, but is provided for users running DonorQuest in-house with less than ideal local area networks. When you add a new donor account, DonorQuest will automatically assign a unique ID number for the new donor. In an in-house network environment, there may be many users at their respective workstations adding new donors at the same time. Since it is absolutely essential that each donor have a unique ID number, it is critical that each workstation inform the main file server immediately when it allocates a new ID number, so that another work station does not use the same ID number. Normally there is no problem with such a communication between the file server and all the workstations. However, on some networks, this communication does not occur quickly enough. Fortunately, DonorQuest has an alternate means of insuring that duplicate donor ID numbers never occur. This alternate means should normally never be triggered. If it is, it could mean that there are other things wrong with the way your network is configured. If you wish to be informed whenever DonorQuest employs this alternate means of duplicate donor ID prevention, then the Warn Of Duplicate ID Compensation switch should be checked.

Maintain Best Year Totals

This should always be enabled for the online version of DonorQuest. If you are using DonorQuest in-house on a slow network, then disabling this feature will improve data entry performance when adding or editing donations.

Auto-Fill Blank Salutations On Record Save

The Salutation fields are used for all correspondence with your donors and prospects. The Salutation 1 is used for the first line of the address block in letters and labels, and the Salutation 2 is used in the "Dear" block of mail merged letters and emails. These fields need to be filled in when adding a new donor record. Having this check box turned on will tell DonorQuest to automatically make an entry in these fields for you if you forget, using the First Name, Last Name, Secondary First Name, and Secondary Last Name fields as a starting point. You are still free to fine tune the Salutation fields for each donor record as needed, even after DonorQuest auto-populates the fields. This feature will only take effect automatically on empty salutation fields when you click the Save button of the Main Information dialog. If you make edit changes to any of the name fields of an existing record, and the Salutation fields already have something in them, DonorQuest will ask before auto-updating them.

Format Telephone Numbers

If this setting is enabled, DonorQuest will format all phone number fields during data entry. For example, if you were to type 2062701050 in the Telephone field and press the tab key, DonorQuest will automatically format the number as (206) 270-1050.

Include Organization Name On Reports

If this setting is enabled, DonorQuest will include your organization's name on all standard reports which use a report heading. DonorQuest will use the name you entered for your organization under Configure, Your Organization's Information, so check there to be sure your organization's name was entered there correctly.

Encrypt Database

DonorQuest is capable of encrypting your entire database while still providing full multi-user access. This feature is intended mainly for those still using DonorQuest in-house on a local file server. The encryption is seamless, so that everything in DonorQuest works just as you would expect for all features. This adds a layer of protection for your sensitive donor data, making your data appear as unreadable gibberish to any would-be thieves which either hack into your main file server over the Internet, or perhaps even physically steal it from your office. Without knowing a DonorQuest User Name and Password, there is no viable way a hacker could decrypt your data if you are running DonorQuest with encryption on. You may also uncheck the box at anytime to return to running in normal unencrypted mode. The only downside of running with encryption on is that it will slow DonorQuest performance slightly, but only by about 10% on average. Any changes to your encryption preference will be processed against the database after you close the Program Settings dialog.

Default Date Format

DonorQuest supports multiple date display formats. Changing this setting has absolutely no effect on how dates are actually stored in the database, it simply controls how they are shown to users in the various DonorQuest screen displays and on any report they may

print. Note that users may override this default organization-wide date setting by clicking on User, Change Your Personal Settings, and setting their own custom date format preference there.

Filter Extended Characters From Data Entry

When pasting text into DonorQuest forms from various sources such as websites or Word documents, the pasted text may contain invisible control characters designed to format the document from which they were copied. These formatting characters have no meaning in DonorQuest and can cause anomalies when processing your data. This option should be enabled to filter out such characters, unless you have a specific need to store them with the text. An example of when you may need support for extended characters is when you are pasting non-English language content, which typically contains extended character codes.

14.1 ID And Receipt Numbers

Configure, Program Settings...

DonorQuest uses several numbering schemes to automatically generate unique identifiers for certain types of information. These numbers normally start at one and increase by whole numbers. However there may be times when you need to set these numbers, and this can be done within the Program Settings dialog. For example, if you import donations from another database which maintained receipt numbers for gifts like DonorQuest does, following the import you would want to set the Next Available Receipt number to the highest number used by the other system, plus one. This way the next gift added to DonorQuest will be assigned a unique Receipt Number, with no worry of there ever being a duplicate receipt between new donations and those you just imported.

Next Available Donor ID Number

DonorQuest automatically allocates a unique ID number for each donor record. This ID is critically important since it links all of the related information for each donor together. For example, while all donations for all donors are physically stored together in a single Donations table, DonorQuest can quickly assemble the donations for a given donor because each donation has the unique ID of the donor to which it belongs.

When a new donor (or prospect) record is added, DonorQuest will assign the new donor the Next Available Donor ID Number, then increase the Next Available Donor ID by one in preparation for the next new donor. Normally the donor ID's simply start at one and go up from there. However there may be times when you wish the ID's for the new donors you add to start at a different number and go up from there. For example, if you have just begun using DonorQuest and you have converted data from a previous system which also used numeric ID numbers, you may wish to start ID number allocation in DonorQuest at a number that is beyond the highest ID used in your old system. This will allow you to easily identify which donor records came from your old system, as opposed to those which you have been added anew in DonorQuest. The Next Available Donor ID Number can be set by you in the Program Settings dialog. Note that it is generally not a good idea to set the

Next Available Donor ID Number to a smaller value than it currently is. While this will not result in donors which have duplicate ID's (DonorQuest checks to be sure a given ID is not in use before assigning it), but it will cause the old ID numbers belonging to deleted donors to be reused. ID numbers can go on and on (the largest can be 999,999,999,999), so there is really no need to ever have to reuse them or try and fill in "gaps." See also Auto-Set Next Available Donor ID.

Next Available Donation Batch Number

Donations can be entered in batches via the Donor, Batch Donation Entry option. This allows donations to be treated in groups based on how you wish to manage your donation entries. When beginning a batch entry of Donations in immediate posting mode, DonorQuest will automatically suggest the Next Available Donation Batch number, which you may accept or override as you begin your entries. This Next Available Donation Batch number which DonorQuest will suggest to the next user beginning a batch entry process may be set via the Next Available Donation Batch Number entry of the Program Settings dialog. If you are running DonorQuest in deferred posting mode, then DonorQuest will not offer the user the ability to choose a batch number when adding new gifts (since batch numbers are assigned during donation posting), and the only way to reset the sequence of batch numbers is via this program setting.

Next Available Receipt Number

DonorQuest will automatically assign a receipt number to Donations as they are added. Normally receipt numbers will simply start at one, and go up from there by whole numbers for however many donations you have. There may be times when you wish to set donation receipt number allocation at a certain number and have it go up from there. For example, if you have converted data from an old system to DonorQuest, and the greatest donation receipt number it had in use is 497,123, you might want to start donation receipt allocation at a nice round 500,000. That way you can easily tell whether a donation was from your old system or was added in DonorQuest by the receipt number it has.

14.2 Fiscal Year Settings

Configure, Program Settings...

Many organizations have a fiscal year which is different from the calendar year. For example, where the calendar year starts on January 1st, fiscal years commonly start on July 1st or October 1st. If today's date were June 30, 2018 and your fiscal year begins July 1, then today would be the last day of the fiscal year 2018. Tomorrow would be the first day of the new fiscal year 2019. Generally speaking, at any point in time the current fiscal year is usually either equal to, or one greater than the current calendar year.

Once you have told DonorQuest the starting month for your fiscal year, and the current fiscal year, DonorQuest will automatically keep track of the fiscal year donation totals for you. Also, DonorQuest will automatically increment the current fiscal year by one at the end of each fiscal year.

If you make any changes to the fiscal year settings in the Program Settings dialog, DonorQuest will begin a recompute process when you close the Program Settings dialog. This is a harmless process, and no donation history is changed in the process. Only the interpretation of fiscal year totals for donation history will change, based on the date for each donation. DonorQuest does not have a formal end of year "lockout" process which prevents you from entering gifts for past years, so don't be afraid to allow the recompute totals process to run when needed.

Starting Month Of Fiscal Year

This program setting allows you to set the starting month for your fiscal year.

Current Fiscal Year Is

This program setting allows you to set the current fiscal year.

14.3 Alternate Unit Settings

Configure, Program Settings...

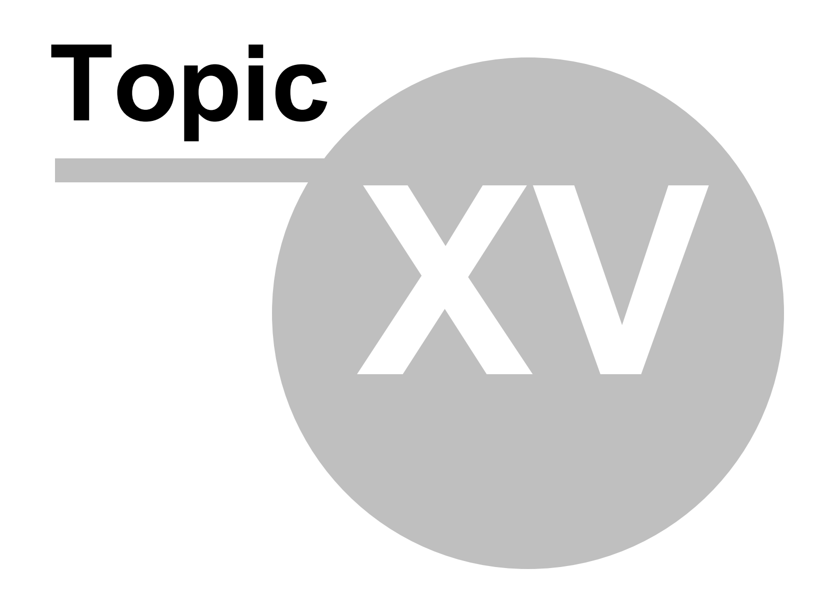
DonorQuest is capable of supporting an unlimited number of alternate donation units. The alternate units are considered to be non-monetary in-kind gifts such as pounds of food, hours of time, etc. Essentially, an alternate unit is any type of quantifiable donation other than a dollar amount. When a donation of alternate unit type is entered, the donation quantity is automatically kept out of the dollar donation totals. This allows you to enter non-monetary amounts in the Donation Amount field, and non-monetary donations can coexist in the various chronological displays of donation history for each donor.

DonorQuest knows when a donation is not a dollar donation by entering one of the alternate unit settings into the donation type field. If the Donation Type code for a given donation matches one of the alternate unit types, then the donation amount will not be counted towards the dollar totals for the donor.

By default, HR and LB are the alternate unit settings standing for hours and pounds respectively.

If you change the donation type code for either of the two alternate units, DonorQuest will automatically begin the recompute totals process when you close the Program Settings window.

Topic



15 User-Defined Fields

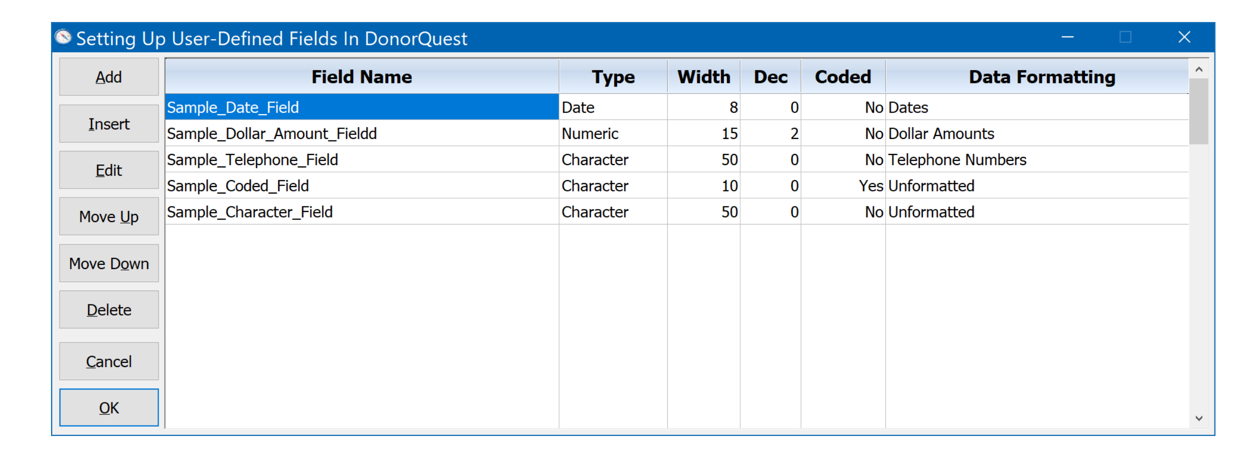
Configure, Setup User-Defined Fields...

DonorQuest was designed to accommodate most of the information you need to maintain about each of your donors. However, due to the unique nature of donor management you may have the need for custom fields. DonorQuest allows you to create custom fields which in every respect will behave like the build-in biographical fields, and will be available for selections, reports, and data exports. When creating a new custom field, you will have control over many aspects of it, including width and data type. Three data types are available: Text, Numeric, and Date. The data type of a field determines how the information it stores is interpreted and ordered on lists. For example, a date field would only store a valid date, and ordering by a date field would always be chronological.

Before adding custom fields to DonorQuest, you should first examine all of the stock fields DonorQuest provides to see if one of them will meet your needs. In particular you should also explore the Memo facility in DonorQuest which provides a simplistic form of text-only user-defined field, and has the advantage of only allocating resources on an as-needed basis. Actual user-defined fields are pre-allocated for all donor records, whether they are used or not.

Since adding or deleting user-defined fields in DonorQuest will cause structural changes to your DonorQuest database, it is standard precaution to run a backup of your database first in case anything unexpected were to happen during the process which would compromise the database (such as a power failure). You can easily backup your DonorQuest files by clicking on System, Run Local Backup.

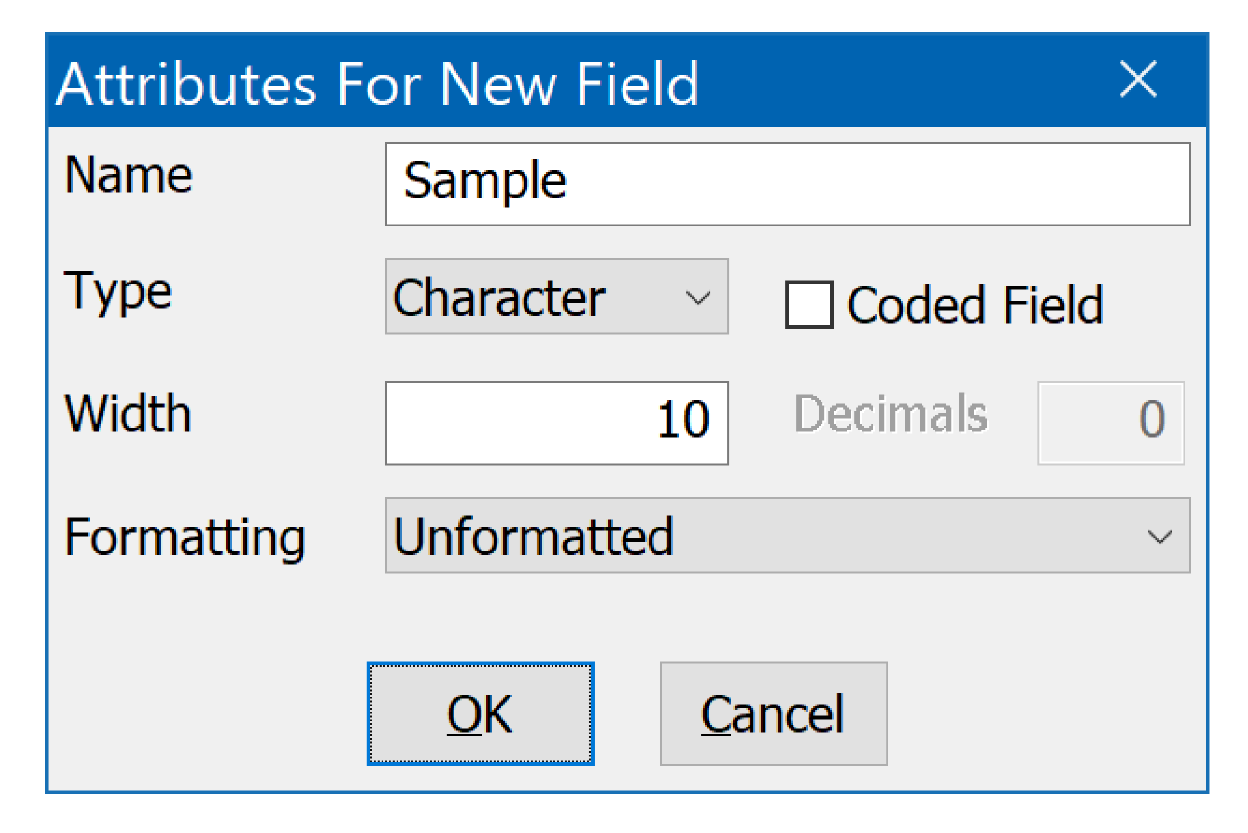
Once you have run a local backup, you may proceed with setting up custom fields by clicking on Configure, Setup User-Defined Fields. Here is an example of what the User-Defined Field setup dialog looks like with some sample fields of various data types defined:



Adding A New Field

To add a new field, click on the Add button (or click the Insert button to add a new field at a

specific position relative to the other existing fields). The following form will appear:



Enter a Name for the field. This is the name that will appear on the data entry form, so be sure that it is descriptive enough for users to know what is meant to be entered in this field. Next choose a Data Type for the field. Your choices are Character, Date, or Numeric. If your field is to contain any Alpha-numeric characters you should choose Character. If your field is going to be a Date, allowing only valid dates to be stored, choose the date type. And if you are going to be entering only numbers, or if you will be using this field in numeric calculations) you should choose the Numeric data type. If this is going to be a Coded field you should place a check in the Coded Field check box and use Character type. It is best to use codes when possible in order to reduce data entry errors. When you create a coded field you will have the ability to add codes and descriptions that the user will see in a drop-down list to choose from that will be associated with and exclusive to the new field.

Enter the maximum width for the field in the Width box. For example a telephone field should be at least 14 characters to accommodate the basic area code, phone number and formatting. For example, (206) 270-1050 is exactly 14 characters including spaces and parentheses. However, you may want a little extra space for extensions, etc.

Enter the number of Decimals that this field should have. This is meant to be used with Numeric data types. Typically this would be "2" (without quotes) for dollar values.

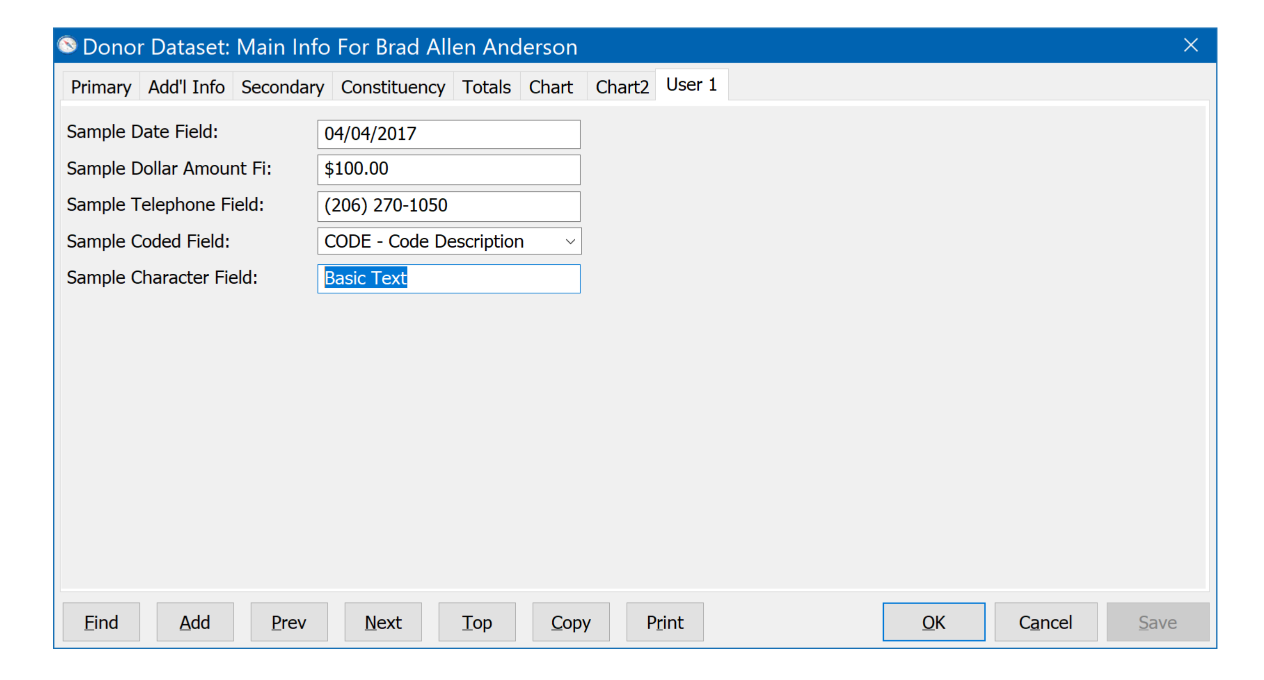
Note: If you choose a formatting of Dollar Amounts (see below) you need to put a value of 2 in Decimals or else the cents will not show up on reports.

Choose any formatting that you'd like to apply to the field. Most fields are unformatted, but you may want to add a telephone field that will format any number that is entered with parentheses and a dash. An example of the result of each of the formatting options appears below, first showing an unformatted value, formatting applied, and formatted value:

Unformatted	2062701050	Telephone Numbers	(206) 270-1050
Unformatted	100	Dollar Amounts	$100.00

When you have finished specifying the attributes of your new field, click on the Ok button to add it to the list of new fields. When you have finished adding all the new fields you need, click on the Ok button of the Setting Up User-Defined Fields dialog to finalize your new fields. They will now be available in all areas of DonorQuest.

To try out your new fields, open the Main Information Form (Donor, Main Information, then click Edit). You should see a new tab called User1 with your custom fields. If you add more than 22 fields, a User 2 tab will appear, then User 3, and so on. With the user-defined fields added in the above example, the Main Information View dialog would look like this:



Move Up / Move Down Buttons

If you wish to change the relative position of a field relative to the other existing fields, you may use the Move Up or Move Down buttons. The order of the fields shown in the field setup window is the same order in which they will be presented in the Main Information window, used for data entry. While this provides sufficient control in most cases, DonorQuest does also allow the creation of custom tabs and forms in which fields can be grouped and arranged at any position in a form, much like they are with the build-in tabs.

Deleting A Field

To delete an existing field, first highlight the field you wish to delete in the Setting Up User-Defined Fields dialog, then click the Delete button. This will permanently remove the field from the database if you then click the Ok button. If you mistakenly delete a field, you may click the Cancel button, but doing so will also cancel any other pending changes you have made since you opened the Setting Up User-Defined Fields dialog.

Topic XVI

16 Available Functions

Introduction to Functions

Functions provide different ways of looking at the data in the various fields of DonorQuest. Functions allow you to make the data within fields appear in a transformed fashion, without altering the actual data itself. Functions also provide a means of converting values you enter to forms that are compatible with particular fields. For example, the "CTOD()" function provides a way to convert a character value such as "10/20/11" to a Date Type, so that it may be compared against database fields which are also of date type.

Functions have applications in many aspects of DonorQuest, and they are one of its greatest strengths. They can be used when defining Reports Layouts, Label Layouts, Selections, and Field Groups used for exporting data to other software programs like Excel. They can also be used in making sweeping changes to your database.

A function can be thought of as a special-purpose "machine." Each special-purpose machine or function expects to be given certain types of data to process. In return, each function will give back information that is a processed version of what it was given, or actually an answer to some question like, "What is the date of this donor's greatest donation?" For example, there is a function called "Upper()". If you give this function a field name, it will return the contents of the field with all letters converted to upper case.

The way you "give" a function information is to enclose the information within parentheses following the function name. For example, to convert the last name of a donor to all upper case (perhaps for comparison to some specific value during a Selection), you would use the "Upper()" function like this:

Upper(.Last_Name.)

The "information" given to a function is called a parameter. In the last example, the parameter to the "Upper()" function was ".Last_Name.". Some functions take more than one parameter, others take no parameters at all. For example, there is a function called "Date()". This function will return today's date, but you do not pass it any parameters. You would simply use it like this:

Date()

...or in creating a true/false selection condition like this:

.Donation_Date. = Date()

In DonorQuest, no function you use will ever change the value of a parameter you pass it. That is to say, if you give a function a parameter such as a field name, you can be assured that the function will not change the data within that field in the database. A function will only generate a temporary value to be used in a condition, report, or export. For example, using the Upper() function on the .Last_Name. field will not change all the

last names to upper case in the database. It will, however, allow you to create a temporary "view" of all the last names that would make them appear as if they were all upper case. However, if you were to assign the output of a function to existing data records using the Replace feature of Selection Results, then you could effectively use a function for mass data changes. But that's using the function output in a special way - the data of field parameter(s) you pass a function will still never be changed.

The functions cataloged in this topic are for reference only. Some are very simple (like the Upper() function), while others can be very complex (like the If() and Sum_In() functions). You really do not need to know anything about functions in order to use DonorQuest effectively. They have been provided as an additional enhancement which goes far beyond what most fundraising systems normally provide. Which functions (if any) you may eventually use really depends on your needs, and how comfortable you are with the concept. If you have a strong background in other business applications like Microsoft Excel and Access, which both allow the use of function-based expressions, you will find DonorQuest functions very easy to use.

There is no compelling reason for you to master every single function immediately. This function topic is a bit like a tool chest -- when you have a particular task to perform, one tool more than any other will probably be best suited to the task, and you'll come looking for it here when the need arises.

In DonorQuest, there are basically four types of information that a function can receive as a parameter, or return as a value. They are:

Character

A character type consists of alphanumerics -- letters and/or numbers mixed together in a stream of characters. The donor address field is a good example of one such field, since it contains letters as well as numbers. The Upper() function is one which takes a character type as a parameter, and returns a value which is also a character type.

Numeric

A Numeric type consists of numbers, sign (shown as a minus symbol for negative numbers), and decimal point only. The donation amount field is of numeric type.

Date

A Date type deals strictly with calendar dates, normally of the form mm/dd/yyyy. Internally DonorQuest will always store date values in a specific way that allows it to always know what it is storing is a date. However, the outward appearance of date values in DonorQuest are governed by the preferences you have set under User, Change Your Personal Settings. There you can choose your preferred date format. DonorQuest also supports date arithmetic, for example, if today is 07/01/2018, then Date() + 1 would be 07/02/2018.

Logical

A Logical type deals only with true/false information. A Logical value is usually returned by

functions that answer yes or no questions.

The topics which follow define each of the functions available for your use in various aspects of DonorQuest. This guide serves merely as a reference of all available DonorQuest functions. The best examples of their use is in the many pre-defined Report Layouts, Field Groups, and Selection Definitions provided with DonorQuest.

16.1 Abs()

Syntax

Abs(<NumericValue>)

Purpose

Abs() is a numeric function that returns the absolute value of a numeric field or numeric expression involving one or more fields. The absolute value of a number is simply the number with any negative sign removed. That is, a negative quantity would be converted to a positive quantity of the same magnitude. The absolute value of a positive number is exactly equal to the number itself.

Parameters

A numeric value to return the absolute value of.

Returns

A numeric value that is the absolute value of the number you give to the Abs() function.

Usage

Abs() is a numeric function that determines the magnitude of a numeric value independent of its sign. It lets you, for example, obtain the difference between two numbers as a positive value without knowing in advance which of the two is larger.

The Abs() function has rather limited application in DonorQuest -- it is more of a mathematical function than anything else. However, it could be useful in reports if you wish to force a numeric column to only display the magnitude of amounts, effectively converting negative amounts to positive ones.

Example

The following examples illustrate Abs():

CALL	RESULT
Abs(-1)	1
Abs(0)	0
Abs(1)	1
Abs(-25.00)	25
Abs(25.00)	24

When defining selection conditions, you may wish to qualify donors based on the absolute difference between their most recent donation and their average donation being greater than some value. For example, lets say we want to qualify all donors with the difference between their most recent donation and their average donation being greater than $500.00. The following selection condition:

Average_Donation_Amount. - .Most_Recent_Donation. > 500

would not work if the average donation amount were $250.00 and the most recent donation were $900.00 since the difference would be -650.00, which is not greater than 500. However, the following selection condition employing the Abs() function would work:

Abs(.Average_Donation_Amount. - .Most_Recent_Donation.) > 500

16.2 AddMonth()

Syntax

AddMonth(<DateValue>, <NumericValue>)

Purpose

Adds or subtracts months to/from a date.

Parameters

<DateValue> is usually a date field, such as donation date.

<NumericValue> is the number of months to advance the specified date <DateValue> by. <NumericValue> is usually a specific value you would enter, such as 1, 2, 3, etc.

Returns

AddMonth() will return a date which is <NumericValue> months past the specified <DateValue> date.

Usage

AddMonth() can be used to age a date by any number of months. You could use it to calculate payment due dates based on an invoice date when creating a billing report for pledges. AddMonth() essentially permits you to add months to a given date. If you use a negative number, months are subtracted.

Example

The following examples illustrate AddMonth():

CALL	RESULT
DATE()	02/25/2014
AddMonth(DATE(), 5)	07/25/2014
AddMonth(DATE(), 12)	02/25/2015

16.3 AddressAbbreviate()

Syntax

AddressAbbreviate(<cAddressToAbbreviate>, <lIgnoreCase>, <lAddPeriods>)

Purpose

To abbreviate street suffixes and directionals in addresses.

Parameters

<cAddressToAbbreviate> is the name of a character field in DonorQuest containing the address you wish to abbreviate. It may also be the name of an address field within an external file which you are importing into DonorQuest.

<lIgnoreCase> is a true/false value. If true, case will be ignored when analyzing the address to abbreviate. If this parameter is true, then the resulting abbreviated address will also be in all upper case.

<lAddPeriods> is a true/false value. If true, periods will be applied to the abbreviations. So an address such as, "1234 First Avenue Northeast" will become, "1234 1st. Ave. N.E."

Returns

The given address, with all fully spelled out street suffixes and directionals translated to their USPS approved abbreviations.

Usage

AddressAbbreviate() is normally used when importing data to insure imported addresses adhere to the standard for addresses you wish to use in your donor database. It may also be used to mass update existing records in your database using the Replace feature of Selection Results. Used in conjunction with the AddressExpand() function, you may format address data to adhere to one of three standards: No Abbreviations, Abbreviations, and Abbreviations with periods. The No Abbreviations standardization would expand all addresses to have the full spellings of street suffixes and directionals, resulting in addresses such as, "1234 First Avenue Northeast." Abbreviations would result in addresses such as, "1234 1st Ave NE", and Abbreviations with periods would result in addresses such as, "1234 1st. Ave. N.E."

Example

The following examples illustrate AddressAbbreviate():

CALL	RESULT
.Address.	1234 First Avenue Northeast
AddressAbbreviate(.Address., .F.)	1234 1st Ave NE
AddressAbbreviate(.Address., .T.)	1234 1ST AVE NE
AddressAbbreviate(.Address., .F., .T.)	1234 1st. Ave. NE.
AddressAbbreviate(.Address., .T., .T.)	1234 1ST. AVE. NE.

16.4 AddressExpand()

Syntax

AddressExpand(<cAddressToExpand>, <lIgnoreCase>)

Purpose

To expand abbreviations in addresses to full spellings, and remove periods.

Parameters

<cAddressToExpand> is the name of a character field in DonorQuest containing the address you wish to expand. It may also be the name of an address field within an external file which you are importing into DonorQuest.

<lIgnoreCase> is a true/false value. If true, case will be ignored during address expansion. This will result in abbreviations such as blvd, Blvd, and BLVD will be considered to be the same and will be expanded to Boulevard. If this parameter is true, then the resulting expanded address will also be in all upper case. If this is not desired, yet you wish to ignore case, then you could apply the CaseNormalize() function to the result in a call like this: CaseNormalize(AddressExpand(.Address.))

Returns

The given address, with all abbreviations translated to their full spellings.

Usage

AddressExpand() is normally used when importing data to insure imported addresses adhere to the standard for addresses you wish to use in your donor database. It may also be used to mass update existing records in your database using the Replace feature of Selection Results. Used in conjunction with the AddressAbbreviate() function, you may format address data to adhere to one of three standards: No Abbreviations, Abbreviations, and Abbreviations with periods. The No Abbreviations standardization would expand all addresses to have the full spellings of street suffixes and directionals, resulting in addresses such as, "1234 First Avenue Northeast." Abbreviations would result in addresses such as, "1234 1st Ave NE", and Abbreviations with periods would result in addresses such as, "1234 1st. Ave. N.E."

The AddressExpand() function also knows common abbreviation misspellings, so it may be used to clean up an already abbreviated list of addresses. For example, replacing all existing addresses with AddressAbbreviate(AddressExpand(.Address.)) would first expand an address to full spellings, including expanding incorrect abbreviations to the intended full names, then it would deliver the entire address properly abbreviated.

Example

The following examples illustrate AddressExpand():

CALL	RESULT
.Address.	1234 1st Ave NE
AddressExpand(.Address.)	1234 First Avenue Northeast
.Address.	1234 1St Ave. N.E.
AddressExpand(.Address.)	1234 First Avenue Northeast
AddressAbbreviate(AddressExpand(.Address.))	1234 1st Ave NE
.Address.	4567 Fine Pky w
AddressExpand(.Address.)	4567 Fine Parkway West
AddressAbbreviate(AddressExpand(.Address.))	4567 Fine Pkwy W

16.5 AllTrim()

Syntax

AllTrim(<FieldName>)

Purpose

To return the characters of a field, less any leading or trailing blank spaces.

Parameters

<FieldName> is the name of a field, or any character expression.

Returns

A Character value.

Usage

This function is intended to be used in situations where you are unsure whether there may be extraneous spaces surrounding the characters in a field, and you wish to compare only the non-space characters of a field against some specific value.

Example

You want to know all the donors with a code number of one. You're not sure whether your data entry person has been entering the code one's as "1__", "_1_", or "__1". Normally, you would have to check each of the three cases individually, using an .OR. connector like this:

(.Code. = "1 ") .OR. (.Code. = " 1 ") .OR. (.Code. = " 1")

Using the "AllTrim()" function, all you would have to do is remove any leading and trailing blanks from each code field before you compare it to the specific character value "1" like this:

AllTrim(.Code.) = "1"

Note that this would not work if the data entry operator had entered "001" to mean code 1. The zeros are not considered blank spaces, and the "AllTrim()" function would not remove them. In a case where the .Code. field might be "001", it is best to use the "VAL()" function (discussed in the pages to come).

16.6 Asc()

Syntax

Asc(<CharacterValue>)

Purpose

To convert a character value to its ASCII numeric value. ASCII values are the numbers the computer uses internally to represent character values. Asc() is a character conversion function that returns the ASCII value of the left-most character in a character value. Asc() is used primarily in expressions where you need to perform numeric calculations on the ASCII value of a character. Chr() and Asc() are inverse functions.

Parameters

<CharacterValue> may be the name of a field, but is usually a single-character quoted value like "A".

Returns

A Numeric value in the range of zero to 255, representing the ASCII value of <CharacterValue>. The ASCII value of a character is the numerical representation of that character used internally by the computer.

Example

The following examples illustrate various results of Asc():

CALL	RESULT
Asc("A")	65
Asc("Apple")	65
Asc("a")	97
Asc("Z") - Asc("A")	25
Asc("")	0

16.7 At()

Syntax

At(<CharacterValue1>, <CharacterValue2>)

Purpose

This function allows you to search a character field or value for the first instance of a specified character sequence, and it will return the starting position as a numeric value.

Parameters

<CharacterValue1> is the character value to locate within <CharacterValue2>. <CharacterValue1> is usually a specific character value which you define by enclosing characters of your choice in quotation marks.

<CharacterValue2> is the character value to be searched. This is usually the name of a database field of character type.

Returns

A Numeric value. If <CharacterValue1> is contained within <CharacterValue2>, At() returns the starting character position that <CharacterValue1> occurs at in <CharacterValue2>. If <CharacterValue1> is not found within <CharacterValue2>, then At () returns 0.

Usage

You can use this function to create Selection conditions which will Select donors based on where in a particular field a specific sequence of characters occurs.

Example

You've found that one of your data entry people entered "Dr." as the last word in the Salutation1 field for some donors, when you really wanted it to be the first word in the salutation1 field for those same donors. What you need to find out is which donors have the value "Dr." starting at a character position of two or more in the Salutation1 field. This can be determined by creating a Custom Selection condition like this:

```
At( "Dr.", .Salutation1. ) >= 2
```

This condition will be true for all donors who have the character value "Dr." occurring in the Salutation1 field at a character position greater than or equal to 2. This function could also be used to search for key words within memo text line.

16.8 Bom()

Syntax

Bom(<DateValue>)

Purpose

To determine the first day of the month for any date.

Parameters

<DateValue> is the date to determine the first day of. If this parameter is omitted, the system date is used (the system date is the same date returned by the Date() function).

Returns

A date value.

Usage

Bom() allows you to determine the first day of the month that contains <DateValue>. This would, for example, allow you to determine how many days have passed since the beginning of the month.

Example

The following examples illustrate BOM():

CALL	RESULT
Date()	02/25/2017
Bom(Date())	02/01/2017
Date() - Bom(Date())	24

16.9 But_First()

Syntax

But_First(<CharacterField>, <Delimiter>)

Purpose

To extract all but the first word from a field.

Parameters

<CharacterField> is the name of any character field in DonorQuest, such as the last or first name field.

<Delimiter> is usually a quoted space (" "). In general, <Delimiter> is whatever separates words within the field from which you wish to extract all but the first word. In most cases, words within fields are separated by a space, but you may also have fields in which commas or semicolons are used to separate words or groups of words.

Returns

All but the first word from within <CharacterField>.

Usage

But_First() can be used with reports to omit the first word from any character field. One possible use of this function would be to design a donation report that would omit the first word of the donation comment field. This could be useful, for example, if you use the donation comment field to store multiple pieces of data, with the first word always being an ID number for an auction item. On DonorQuest reports and exports, you could isolate the other items in the comment from the auction ID using the But_First() function.

Example

The following examples illustrate the use of But_First().

CALL	RESULT
Donation_Comment.	319874 General Comment
But_First(.Donation_Comment., " ")	General Comment

16.10 But_Last()

Syntax

But_Last(<CharacterField>, <Delimiter>)

Purpose

To extract all but the last word from a field.

Parameters

<CharacterField> is the name of any character field in DonorQuest, such as the last or first name field.

<Delimiter> is usually a quoted space (" "). In general, <Delimiter> is whatever separates words within the field from which you wish to extract all but the last word. In most cases, words within fields are separated by a space, but you may also have fields in which commas or semicolons are used to separate words or groups of words.

Returns

All but the last word from within <CharacterField>.

Usage

But_Last() can be used with reports to omit the last word from any character field. One possible use of this function would be to design a donation report which would omit the last word of the second name field. Since the second name field is generally used to store the full name of a partner or spouse (in the case of individual donors) or the name of the contact person for an organization, applying the But_Last() function to the second name field would return everything but the last name from the second name field.

Example

The following example illustrates the use of But_Last().

CALL	RESULT
Second_Name.	James A. Smith
But_Last(.Second_Name., " ")	James A.

16.11 CaseNormalize()

Syntax

CaseNormalize(<CharacterField>)

Purpose

To convert a character field to mixed case.

Parameters

<CharacterField> can be the name of any character field in DonorQuest, but it is usually a name or address field.

Returns

CaseNormalize() will return the contents of the specified character field with all words converted to mixed case. Mixed case means that the first letter of each word is capitalized, and the other letters are in lower case.

Usage

Some database programs force you to enter names and addresses in all upper case letters. If you import names and addresses from such a program into DonorQuest, the names and addresses will transfer in all upper case, just as they were entered. However, this is seldom desirable. Since DonorQuest allows for standard mixed case names and addresses, it is best to maintain all of your names and addresses this way.

After such an import you would normally have to manually edit each imported name and address to administer the correct capitalization. However, you could use the CaseNormalize() function to automate the process for you. You would proceed by performing a selection for the newly imported names and addresses. You would then use the replace command (see section seven) while viewing the selection result to apply the CaseNormalize() function to the fields which require it.

Of course, you could also keep the names and addresses in all upper case if you wish, and simply use the CaseNormalize() function with the report writer to make names and addresses look nice on printed reports.

Example

The following examples illustrate CaseNormalize():

CALL	RESULT
CaseNormalize("JOHN SMITH")	John Smith
CaseNormalize("1234 COSMIC ST.")	1234 Cosmic St.

16.12 CDOW()

Syntax

CDOW(<DateValue>)

Purpose

To determine the Day Of Week for a given date value.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

CDOW() returns the name of the day of the week as a character value. The first letter is upper case and the rest of the value is lower case.

Usage

CDOW() can be used to print the day of week for dates in reports. This information may also be useful if you wish to define a selection condition based on what day of the week a donor made a donation, or perhaps what day of the week the history of a donor was last altered.

Example

The following examples illustrate CDOW():

CALL	RESULT
DATE()	10/01/2011
CDOW(DATE())	Saturday
CDOW(DATE() + 7)	Saturday
CDOW(CTOD("06/14/2011"))	Tuesday

In defining a report, perhaps you wish the day of the week each donation was made to appear next to the calendar date. To derive the day of the week for each donation, you could use the following expression in the Report Writer:

CDOW(.Donation_Date.)

16.13 Char_Filter()

Syntax

Char_Filter(<CharacterField>, <CharRetain>, <CharOmit>)

Purpose

To return a "filtered" copy of a character field, retaining certain characters while omitting others.

Parameters

<CharacterField> is the field to return a filtered copy of. This can be any character field in DonorQuest.

<CharRetain> is the character or characters to allow to remain in the filtered copy of <CharacterField>.

<CharOmit> is the character or characters to omit from the filtered copy of <CharacterField>.

Returns

A character value.

Usage

You can use Char_Filter() to design reports or mailing labels which remove undesired characters from a field while printing. For example, you could use Char_Filter() to filter out all punctuation characters in addresses, or to remove parenthesis and dashes from telephone numbers.

Example

The following examples illustrate Char_Filter():

CALL	RESULT
Char_Filter("123 N. Main St.",, ".")	123 N Main St
Char_Filter("(415) 572-8188",, "()-")	4155728188

Note that the above examples used the <CharOmit> parameter, but they did not use the <CharRetain> parameter. This was done by placing two commas after the <CharacterField> parameter.

16.14 Chr()

Syntax

Chr(<NumericValue>)

Purpose

Chr() is a numeric conversion function that converts an ASCII numeric code to a character. It is the inverse of ASC().

Parameters

<NumericValue> is an ASCII code in the range of zero to 255.

Returns

Chr() returns a single character value whose ASCII code is specified by <NumericValue>.

Usage

You may use Chr() embed "invisible" characters in reports or data exports which do not actually display in the output, but which have side effects.

Example

In a data export to be used with Excel, you wish to embed a New Line character sequence in a single cell, causing the exported data for the cell to be formatted on multiple lines. The following expression would embed a new line command sequence between Salutation 1 and the Address fields:

.Salutation1. + Chr(13) + Chr(10) + .Address.

16.15 CMonth()

Syntax

CMonth(<DateValue>)

Purpose

To determine the month for a given date value.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of date type -- such as the current date returned by the "Date()" function.

Returns

CMonth() returns the name of the month from a date value as a character value. The first letter is upper case and the rest of the return value is lower case.

Usage

CMonth() can be used to print the full spelling of the month for dates in Reports. This information may also be useful if you wish to define a selection condition based on what month of the year a donor made donations, or perhaps what month the history of a donor was last altered.

Example

The following examples illustrate CMonth():

CALL	RESULT
DATE()	09/29/2016
CMonth(DATE())	September
CMonth(DATE() + 45)	October
CMonth(DATE()) + STR(DAY(DATE()))	September 29

In defining a report, perhaps you wish the name for the month of the year each donation was made to appear next to the calendar date. To derive the name for the month of the year for each donation, you could use the following expression in the Report Writer:

CMonth(.Donation_Date.)

16.16 CityForZip()

Syntax

CityForZip(<CharacterValue>, <NumericValue>)

Purpose

Given a specific zip code, this function will return the name of the city associated with the zip code. Normally only one city is associated with a zip code, but if multiple cities are associated with the zip code, a specific associated zip code may be fetched by passing the number of the desired associated city as the second parameter. Passing zero for the second parameter will cause the CityForZip() to return the number of cities associated with the given zip code.

Parameters

<CharacterValue> may be the name of any character field, but is usually the Zip field. A character (alpha-numeric) field is used for zip codes since they may contain a dash.

<NumericValue> is an optional parameter which specifies which city to return for the given zip code (most zip codes have only one city associated with them). If omitted, the first city will be returned. If passed as zero, then a count of the number of cities associated with the given zip code will be returned.

Returns

The name of the city associated with the given zip code. Or, if <NumericValue> is zero, the number of cities associated with the given zip code.

Usage

This function can be used with custom selections. For example, a custom selection could be written to find all the constituents in a zip code bordering multiple cities, or dedicated to a single city.

Example

The following examples illustrate various results of CityForZip():

CALL	RESULT
CityForZip(.Zip., 0) > 1	True if zip borders multiple cities.
CityForZip(.Zip., 0) = 1	True if zip contained within a single city.
CityForZip("83864")	Sandpoint
CityForZip("83864", 0)	1
CityForZip("83864", 1)	Sandpoint

16.17 CityValidForZip()

Syntax

CityValidFor(<cZip>, <cCity>, <IgnoreCase>)

Purpose

Given a specific zip code and city name, this function will return true if the given zip and city are a valid combination to use in an address. When used in a custom selection, this function can identify the constituents in your database which have an invalid zip and city combination in their mailing address. Once in a selection result, these invalid addresses may then be viewed and corrected as a group. A typical custom selection expression using this function would be: CityForZip(.Zip., .City.)

Parameters

<cZip> Is the zip code to check. Must be a character (alpha-numeric) value since zip codes may contain a dash. In a custom selection, this is typically the .Zip. field, though it may be any field containing a zip code.

<cCity> Is a character value giving the city to check. In a custom selection this is typically the .City. field, though it may be any field containing a city name.

<IgnoreCase> Pass as True if you wish case to be ignored when checking whether or not a given zip and city combination are valid. Defaults to True.

Returns

A true/false value.

Usage

This function can be used with custom selections. For example, a custom selection could be written to find all the constituents which have an invalid zip and city combination in their main address.

Example

The following examples illustrate various results of CityValidForZip():

CALL	RESULT
CityForZip("83864", "Sandpoint")	True
CityForZip("83864", "Seattle")	False
CityForZip("83864", "SandPoint")	True
CityForZip("83864", "SandPoint", .F.)	False
CityForZip("60657", "Chicago")	True

16.18 CountyForZip()

Syntax

CountyForZip(<CharacterValue>, <NumericValue>)

Purpose

Given a specific zip code, this function will return the name of the county associated with the zip code. Normally only one county is associated with a zip code, but if multiple counties are associated with the zip code, a specific associated county code may be fetched by passing the number of the desired associated county as the second parameter. Passing zero for the second parameter will cause the CityForZip() to return the number of counties associated with the given zip code. About twenty percent of zip codes in the United States are associated with multiple counties.

Parameters

<CharacterValue> may be the name of any character field, but is usually the Zip field. A character (alpha-numeric) field is used for zip codes since they may contain a dash.

<NumericValue> is an optional parameter which specifies which county to return for the given zip code (most zip codes have only one county associated with them). If omitted, the first associated county will be returned. If passed as zero, then a count of the number of counties associated with the given zip code will be returned.

Returns

The name of the county associated with the given zip code. Or, if <NumericValue> is zero, the number of counties associated with the given zip code.

Usage

This function can be used with custom selections. For example, a custom selection could be written to find all the constituents in a zip code bordering multiple counties, or dedicated to a single county.

Example

The following examples illustrate various results of CountyForZip():

CALL	RESULT
CountyForZip(.Zip., 0) > 1	True if zip borders multiple counties.
CountyForZip(.Zip., 0) = 1	True if zip contained within a single county.
CountyForZip("83864")	Bonner
CountyForZip("83864", 0)	1
CountyForZip("83864", 1)	Bonner

16.19 CountyValidForZip()

Syntax

CountyValidForZip(<cZip>, <cCounty>, <IgnoreCase>)

Purpose

Given a specific zip code and county name, this function will return true if the given zip and county are a valid combination to use in an address. When used in a custom selection, this function can identify the constituents in your database which have an invalid zip and county combination in their mailing address. Once in a selection result, these invalid addresses may then be viewed and corrected as a group. A typical custom selection expression using this function would be: CountyValidForZip(.Zip., .County.)

Parameters

<cZip> Is the zip code to check. Must be a character (alpha-numeric) value since zip codes may contain a dash. In a custom selection, this is typically the .Zip. field, though it may be any field containing a zip code.

<cCounty> Is a character value giving the county to check. In a custom selection this is typically the .County. field, though it may be any field containing a county name.

<IgnoreCase> Pass as True if you wish case to be ignored when checking whether or not a given zip and county combination are valid. Defaults to True.

Returns

A true/false value.

Usage

This function can be used with custom selections. For example, a custom selection could be written to find all the constituents which have an invalid zip and county combination in their main address.

Example

The following examples illustrate various results of CountyValidForZip():

CALL	RESULT
CountyValidForZip("83864", "Bonner")	True
CountyValidForZip("83864", "King")	False
CountyValidForZip("83864", "BONNER")	True
CountyValidForZip("83864", "BONNER", .F.)	False
CountyValidForZip("60657", "Cook")	True

16.20 CToD()

Syntax

CToD(<CharacterValue>)

Purpose

To convert a date-formatted character value to a date value type.

Parameters

<CharacterValue> is a character value of the form (mm/dd/yy), where "mm" is the two-digit number for the Month, "dd" is the two-digit number for the Day, and "yy" is the two-digit number for the year. <CharacterValue> is normally a specific value which you supply.

Returns

A Date value.

Usage

This function allows you to convert a character value formatted as a date to a true date type so that you can compare it against a field that is of date type.

Example

If you are using the "Sum_In()" function to add up donation amounts for each donor, and you wish to only add up donations which were made after 01/15/2017, then you would use the "CToD()" function to convert the value "01/15/2017" to a true date type which you may compare to each donation date. The actual condition might look like this:

.Donation_Date. >= CToD("01/15/2017")

16.21 CurrentFY()

Syntax

CurrentFY()

Purpose

To retrieve the current fiscal year for your organization during a report or other process.

Parameters

None.

Returns

Return the current fiscal year for your organization.

Usage

Many organizations have a fiscal year that is different from the calendar year. For example, where the calendar year starts on January first, fiscal years commonly start on July first. If today's date were June 30, 2011, and your fiscal year begins July 1, then today would be the last day of the fiscal year 2011. Tomorrow would be the first day of fiscal year 2012. Generally speaking, at any point in time the fiscal year is usually either equal to, or one greater than the calendar year.

Once you have told DonorQuest the starting month for your fiscal year, and the current fiscal year (via the fiscal year settings option described in section seventeen), DonorQuest will automatically keep track of the fiscal year donation totals for you. Also, DonorQuest will automatically increment the current fiscal year by one at the end of each fiscal year.

The CurrentFY() function can be used in reports and selection conditions to retrieve the current fiscal year at anytime. You can use the CurrentFY() function in combination with other fiscal year functions to select specific donations. For example, if you wish to select all of the donations for the current fiscal year, you could use the following selection condition:

Example

FiscalYearOf(.Donation_Date.) = CurrentFY()

The above example used the FiscalYearOf() function to determine the fiscal year of a donation date so that it could be compared to the current fiscal year. Since calendar dates are used for donation dates, the FiscalYearOf() function is quite valuable in this instance.

16.22 Cushion()

Syntax

Cushion(<CharacterField>)

Purpose

To add a space between character fields when combining fields together.

Parameters

<CharacterField> can be any character field in DonorQuest.

Returns

Cushion() will return <CharacterField> with a single trailing space, if and only if there is something in <CharacterField>.

Usage

Cushion() is used to conditionally add a space character to a name or address when combining information from the various character fields in DonorQuest. A space is only added if the field to which Cushion() is applied has data.

The Cushion() function can be very useful when defining reports for which certain columns contain two or more character fields combined with the plus (+) symbol.

Example

The following expressions combine the first and last name fields together both with and without use of the Cushion() function. Notice that without the Cushion() function, the last name begins immediately after the first name:

CALL	RESULT
.First_Name.	John
.Last_Name.	Smith
.First_Name. + .Last_Name.	JohnSmith
Cushion(.First_Name.) + .Last_Name.	John Smith

Note that the following expression:

.First_Name. + " " + .Last_Name.

...would, in most cases, produce the same result as applying the Cushion() function to the first name field. However, if the first name field were to be empty for a given donor, the above expression would produce an unwanted space before the last name. The Cushion() function is smart enough to only add a space to the first name if there is indeed a first name to print.

16.23 Date()

Syntax

Date()

Purpose

To return the system date (today's date) as a date value.

Parameters

None.

Returns

A Date value.

Usage

This function is intended to be used when comparing the dates of donations or pledges against the current date.

Example

If you are using the "Sum_In()" function to add up donation amounts for each donor, and you wish to only add up donations which were made during the past year, then you could use the "Date()" function to get the value of today's date, subtract 365 days, and compare the resulting date against each donation date. The actual condition might look like this:

.Donation_Date. >= (Date() - 365)

16.24 DateWithinFiscalYTD

Syntax

DateWithinFiscalYTD(DateValue>)

Purpose

To determine whether or not a given date is within the fiscal year-to-date.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

DateWithinFiscalYTD() returns true if the date you give it is within the current period you are in for the fiscal year. Today's date is used internally to know how far along you are in the current fiscal year. The date you give is tested within its own fiscal year for being within the fiscal year-to-date. So for example, if your fiscal year starts on July 1st, and today's date is 09/01/2018, dates such as 08/01/2015, 08/05/2016, and 08/15/2017 would all be within the current fiscal year-to-date, but a date such as 09/02/2016 would not since it is just one day past the fiscal year-to-date if today is 09/01/2018. Note that the starting month of the fiscal year for your organization is set under Configure, Program Settings.

Usage

DateWithinFiscalYTD() is typically used on reports which give fiscal year-to-date totals.

Example

The following examples show the DateWithinFiscalYTD() with some sample dates when a July 1st starting month is set for your organization's fiscal year:

CALL	RESULT
Date()	09/01/2018
DateWithinFiscalYTD(CtoD("08/01/2015"))	True
DateWithinFiscalYTD(CtoD("08/05/2016"))	True
DateWithinFiscalYTD(CtoD("08/15/2017"))	True
DateWithinFiscalYTD(CtoD("09/02/2016"))	False
DateWithinFiscalYTD(CtoD("06/01/2018"))	False

16.25 Day()

Syntax

Day(<DateValue>)

Purpose

To determine the Day Of Month for a given date value.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

Day() returns a number in the range of 0..31 as an integer numeric value. If the month is February, leap years are considered. If the date parameter is February 29 and the year is not a leap year, Day() returns zero. If the date parameter is empty (" / / "), Day() returns zero.

Usage

Day() is a date conversion function used to convert a date value to the day of a month. This function is used in combination with CMonth() and Year() to format dates. In addition, it is often used in various date calculations.

Example

The following examples show the Day() function used in several ways:

CALL	RESULT
Date()	10/01/2016
Day(Date())	1
Day(Date()) + 1	2
Day(CToD(""))	0

This example uses Day() in combination with CMonth() and Year() to format a donation date value for the Report Writer:

CMonth(.Donation_Date.) + Str(Day(.Donation_Date.)) + ", " + Str(Year(.Donation_Date.))

The result would be similar to:
October 1, 2016

16.26 DaysIntoFiscalYear()

Syntax

DaysIntoFiscalYear(DateValue>)

Purpose

To determine the number of days a given date is into the fiscal year for the date.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

DaysIntoFiscalYear() returns the number of days between the start of the fiscal year for your organization and a specific date. The date you give is checked within its own fiscal year, so leap years are accounted for. For example, if your fiscal year starts on July 1st, 07/15/2018, would be 14 days into the fiscal year. Likewise, 08/01/2018 would be 31 days into the fiscal year for that date, and 03/01/2019 would be 243 days into the fiscal year for that date. Note that the starting month of the fiscal year for your organization is set under Configure, Program Settings.

Usage

DaysIntoFiscalYear() is typically used in custom selections (queries).

Example

The following examples show the DaysIntoFiscalYear() with some sample dates when a July 1st starting month is set for your organization's fiscal year:

CALL	RESULT
Date()	09/01/2018
DaysIntoFiscalYear(CtoD("07/15/2008"))	14
DaysIntoFiscalYear(CtoD("07/15/2018"))	14
DaysIntoFiscalYear(CtoD("08/01/2018"))	31
DaysIntoFiscalYear(CtoD("03/01/2019"))	243
DaysIntoFiscalYear(CtoD("06/30/2016"))	364

16.27 Decode()

Syntax

Decode(<CodedField>)

Purpose

To translate the code from a coded field to the full description of the code during the printing of a report.

Parameters

<CodedField> is the name of a coded field in DonorQuest. This field can be any of the coded fields, such as donor type, title, state, country, donation type, donation account, donation stimulus, etc.

Returns

The full description of a code.

Usage

Decode() is normally used with the report writer to produce reports which print the full description for particular coded fields within DonorQuest.

Example

The following examples illustrate Decode():

CALL	RESULT
.Donor_Type.	I
Decode(.Donor_Type.)	Individual
.Donation_Type.	VC
Decode(.Donation_Type.)	Visa Card
.State.	CA
Decode(.State.)	California

In order for Decode() to work properly, you must have entered descriptions for all of the codes used by your organization. The entry of descriptions for new codes can be done at data entry time inside the data entry module. To add descriptions to existing codes, you must use the Codes Maintenance option of the System Information And Maintenance menu (see section eighteen).

If the Decode() function is asked to translate a code for which there is no description yet defined, Decode() will simply return the code it was given as the description. Because of this feature, you can use Decode() freely on all coded fields in reports without worrying

about Decode() causing a blank space to print when there is no translation for a code.

16.28 Descend()

Syntax

Descend(<CharacterField>)

Purpose

To alphabetize reports or mailing labels in descending order by any field or combination of fields.

Parameters

<CharacterField> is generally the name of the field you wish to alphabetize in descending order by. <CharacterField> may also be a combination of two or more fields.

Returns

Descend() will return <CharacterField> in an inverted form which lends itself to a descending alphabetical sort.

Usage

Both the report writer and label writer allow for the incorporation of a specific sort order expression as part of the report and mailing label formats. When the Descend() function is applied to this sort order expression, the resulting report will be in descending alphabetical order. For example, specifying a sort expression of:

.Last_Name. + .First_Name.

would result in a report or mailing label printout which would be sorted in ascending order by last name and first name. To create a descending sort order by last name and first name, you would apply the Descend() function like this:

Descend(.Last_Name. + .First_Name.)

Note that both .Last_Name. and .First_Name. are character fields. If you wish to mix character fields with other type of fields (such as date or numeric) in a single sort expression, you will have to use the appropriate conversion function to convert fields of date or numeric type to character. For example, to alphabetize donors by donation total, last name, and first name, you would use the following expression:

Str(.Donation_Total., 12, 2) + .Last_Name. + .First_Name.

For more information on establishing sort order expressions for reports and mailing labels, please refer to sections thirteen and fourteen, respectively.

16.29 DonValFor()

Syntax

DonValFor(<Condition>, <FieldExpr>)

Purpose

To retrieve the value of a donation field or field expression for a specific donation in a given donor's history.

Parameters

<Condition> is any expression which evaluates to true or false. This expression is used to tell DonValFor() which donation you wish to retrieve a value for. The condition should be very specific so that DonValFor() can pinpoint the exact donation you are interested in. For example, <Condition> could be used to select a donation containing a certain comment in the donation comment field, or perhaps a donation made within a specific date range.

<FieldExpr> is the donation field or field expression you wish DonValFor() to return the value of for the specific donation identified via the <Condition> parameter.

Returns

DonValFor() will return the value of a donation field or field expression for a specific donation in a given donor's history. The type of data value returned by DonValFor() will be the same as <FieldExpr>.

Usage

DonValFor() can be used to "reach in" to a donor's donation history to retrieve information from a specific donation. For example, to create a report with a column containing the comment of the most recent donation for each donor, you could use the following DonValFor() expression:

Example

DonValFor(.Donation_Number. = .#_Donations., .Donation_Amount)

16.30 DOW()

Syntax

DOW(<DateValue>)

Purpose

To determine the numeric Day Of Week for a given date value.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

DOW() returns the day of the week as a number between zero and seven. The first day of the week is one (Sunday) and the last is seven (Saturday). If <DateValue> is empty (" / / "), DOW() returns zero.

Usage

DOW() is a date conversion function that converts a date value to a number identifying the day of the week. It is useful when you want date calculations on a weekly basis. DOW() is similar to CDOW() which returns the day of week as a character value instead of a number.

Example

The following examples illustrate DOW() and its relationship to CDOW():

CALL	RESULT
Date()	03/15/2011
DOW(Date())	3
CDOW(Date())	Tuesday
DOW(Date() - 2)	1
CDOW(Date() - 2)	Sunday

16.31 DToC()

Syntax

DToC(<DateValue>)

Purpose

To convert a date to a character value of the form "mm/dd/yy".

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

DToC() returns a character value representation of a date value so that it may be combined with other character values using the + operator. The standard American date format of (mm/dd/yy) is not appropriate for sorting since dates of this format would be "alphabetized" starting with month, then day, then year. If you wish to convert a date value to a character value for use in ordering data, use the DtoS() function instead. A null (empty) date returns a character value consisting of eight spaces.

Usage

DToC() is a date conversion function that converts a date value to a character value, so that you may combine the date with other character values.

Example

In a custom donation receipt report, you wish to have a phrase referencing . Donation_Date. combined with other text. You could do this by entering the following expression:

"Your most recent donation was made on " + DToC(.Donation_Date.)

16.32 DToS()

Syntax

DToS(<DateValue>)

Purpose

To convert a date to a character value of the form "yyyymmdd".

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

DToS() returns a character value representation of a date value. The return value is formatted in a way which is appropriate when you wish to use a date field in a sort expression, possibly along with other fields. The standard American date format of (mm/dd/yy) is not appropriate for sorting since dates of this format would be "alphabetized" starting with month, then day, then year. A null (empty) date returns a character value consisting of eight spaces.

Usage

DToS() is a date conversion function that converts a date value to a character value, so that you may combine the date with other character values, usually in an expression used to sort (alphabetize) data.

Example

In a report based on the Donations table, you wish to group by donation date, allowing you to get subtotals for each day. You could do this by entering the following expression for the report Group:

DToS(.Donation_Date.)

16.33 Empty()

Syntax

Empty(<FieldName>)

Purpose

To determine whether a field is empty. That is, whether the field has no data in it.

Parameters

<FieldName> is the name of a field.

Returns

A Logical (true/false) value.

Usage

This function is intended to be used to test fields for not having data.

Example

You want to know all of the donors who have nothing in their Salutation1 field. This can be accomplished using a Custom selection consisting of a single condition like this:

Empty(.Salutation1.)

Notice that since the "Empty()" function returns a logical value, it creates a valid selection condition all by itself. After all, that's all selection conditions really are -- just logical (true/false) expressions. You could also ask the opposite question of "who are the donors with data in their salutation field" by simply negating the logical result of "Empty()" like this:

.NOT. Empty(.Salutation1.)

16.34 EOM()

Syntax

EOM(<DateValue>)

Purpose

Determines the date for the last day of a month.

Parameters

<DateValue> designates the date for which the last day of the month is calulated. If you do not specify this parameter, EOM() will use the system date (given by the Date() function) by default.

Returns

A date value.

Usage

EOM() determines the last day of the month in which <DateValue> lies. It also allows you to calculate how many days remain until the end of the month.

Example

The following examples illustrate EOM():

CALL	RESULT
EOM() - Date()	Days left in current month.
EOM(CToD("02/01/2018"))	02/28/2018
EOM(CToD("03/20/2018"))	03/31/2018

If you send pledge reminders out on a monthly basis, you may be interested to know which pledge payments come within five days of being past due. In order to create a Template or Custom selection to identify such payments, you would have to know the number of days in the current month. The following EOM() expression would select pledged-linked donations which were received within the last five days of a month:

.Donation_Pledge_ID_Link. > 0 .And.
EOM(.Donation_Date.) - .Donation_Date. <= 5

16.35 FiscalYearOf()

Syntax

FiscalYearOf(<DateValue>)

Purpose

To retrieve the fiscal year for a given calendar date.

Parameters

<DateValue> is usually the name of a calendar date field in DonorQuest.

Returns

The fiscal year in which <DateValue> lies.

Usage

Many organizations have a fiscal year which is different from the calendar year. For example, where the calendar year starts on January first, fiscal years commonly start on July first. If today's date were June 30, 2011, and your fiscal year begins July 1, then today would be the last day of the fiscal year 2011. Tomorrow would be the first day of fiscal year 2012. Generally speaking, at any point in time the fiscal year is usually either equal to, or one greater than the calendar year.

Once you have told DonorQuest the starting month for your fiscal year, and the current fiscal year (my clicking on Configure, Program Settings), DonorQuest will automatically keep track of the fiscal year donation totals for you. Also, DonorQuest will automatically increment the current fiscal year by one at the end of each fiscal year.

This fiscal year orientation of many organizations makes dealing with calendar dates difficult. For example, if you want to create a selection that would collect all the donations made in fiscal year 2011, you would normally have to create a complex date range condition to check if a given donation date "falls between" the actual calendar dates which make up fiscal year 2011.

The FiscalYearOf() function alleviates much of this difficulty. In fact, since DonorQuest knows the beginning fiscal month for your organization, you don't even have to know the range of actual calendar dates that make up your fiscal year. The following FiscalYearOf() expression would easily accomplish the selection described above:

Example

FiscalYearOf(.Donation_Date.) = 2011

You could also use FiscalYearOf() in conjunction with the CurrentFY() function to select all donations for the current fiscal year as follows:

FiscalYearOf(.Donation_Date.) = CurrentFY()

16.36 GetDate()

Syntax

GetDate(<CharacterValue>)

Purpose

To convert a character value to a date value.

Parameters

<CharacterValue> is a character value usually of the form (mm/dd/yy), where "mm" is the two-digit number for the Month, "dd" is the two-digit number for the Day, and "yy" is the two-digit number for the year. However, with the GetDate() function, the form of the date in <CharacterValue> could also be a formal date such as "September 13, 1999".

Returns

A Date value.

Usage

This function allows you to convert the date inside a character field to a true date type so that you can compare it against a field that is of date type. More commonly, you may wish to use GetDate() to translate freshly imported donor data involving date information from a character form to a true date form for storage in DonorQuest date fields.

GetDate() is similar to the CToD() function, but it differs in that GetDate() is capable of translating formal date-formatted character values such as "September 13, 1999".

Example

The following examples illustrate GetDate():

CALL	RESULT
GetDate("09/13/99")	09/13/1999
GetDate("September 13, 1999")	09/13/1999
GetDate("FEBRUARY 4, 2017")	02/04/2017

16.37 Get_Token()

Syntax

Get_Token(<CharacterField>, <Word>, <Delimiter>)

Purpose

To extract a specific word from a character field.

Parameters

<CharacterField> is the name of any character field in DonorQuest, such as the last or first name field.

<Word> is the number of the desired word.

<Delimiter> is usually a quoted space (" "). In general, <Delimiter> is whatever separates words within the field from which you wish to extract a single word. In most cases, words within fields are separated by a space, but you may also have fields in which commas or semicolons are used to separate words or groups of words.

Returns

A specific word from within <CharacterField>.

Usage

Get_Token() can be used with reports to print a specific word from any character field in DonorQuest. But its power goes well beyond simply dealing with words within fields. The term "token" really applies to any part of a character field that is delimited by a special character or characters. This ability lets you create subfields within fields.

For example, let's say your organization is holding an auction, and you want to store the following extra information with each gift:

1. A number representing the item purchased.
2. A number representing the number of bids placed for the item in selling it.
3. A general comment.

Since there is not a dedicated donation field for each of these items, they must all go in the donation comment field. However, if you establish a convention for auction item donations in which you use semicolons to separate each of these items in the donation comment field, you will be able to specifically extract each of them as if they were stored in separate fields in DonorQuest reports and data exports.

Example

The following examples illustrate the use of Get_Token() outlined above. This example is based on an instance of the .Donation_Comment. being equal to "123; 5; Donor very excited with purchase!"

CALL	RESULT
.Donation_Comment.	123; 5; Donor very excited with purchase!
Get_Token(.Donation_Comment., 1, ";")	123
Get_Token(.Donation_Comment., 2, ";")	5
Get_Token(.Donation_Comment., 3, ";")	Donor very excited with purchase!

The technique outlined above could be easily adapted to memo text lines, allowing you to have multiple fields within particular memo text lines. The solicitation system in DonorQuest actually uses this technique to store the date, campaign code, date of last follow up, and number of follow-ups for each solicitation cycle, all in the text field of a single memo line. Each "field" within the single memo text entry are separated (delimited) by a semicolon (";").

16.38 IDLookUp()

Syntax

IDLookUp(<IDNumber>, <FieldExpr>)

Purpose

To return field information from the record of a related donor during a report.

Parameters

<IDNumber> is the ID number of the related donor. This number is usually taken from one of the linkage fields of the current donor during a report. Linkage fields are fields such as the related donor and matching donor ID fields.

<FieldExpr> is usually the name of a single field, but it could also be a field expression consisting of a combination of two or more fields. The <FieldExpr> refers to the information you wish to get from a donor account somehow related to the current donor during the printing of a report.

Returns

Returns the value given by <FieldExpr>.

Usage

A donor can be related to other donors in many ways. For example, there is a field called . Matching_Gift_Donor. which, for each donor, stores the ID number of another donor who has promised to make matching gifts.

You may wish to create a report which describes how each donor is related to other donors. In such a report, you often need to temporarily reach into the "other donor's" record to get information.

Example

The following example shows how you could retrieve the last name of the matching gift donor, using the IDLookUp() function along with the .Matching_Gift_Donor. field:

IDLookUp(.Matching_Gift_Donor., .Last_Name.)

16.39 If()

Syntax

If(<ConditionExpression>, <TrueValue>, <FalseValue>)

Purpose

To evaluate a condition expression (which will evaluate to either TRUE or FALSE), and return one of two values based upon whether the condition was true or false.

Parameters

<ConditionExpression> must evaluate to TRUE or FALSE.

<TrueValue> is a value to return if <ConditionExpression> is true.

<FalseValue> is a value to return if <ConditionExpression> is false.

Returns

Either the <TrueValue>, or the <FalseValue>, depending on whether <ConditionExpression> is true or false.

Usage

This function is a very advanced function, and is provided for use in very special cases. It provides a way of performing IF-THEN-ELSE logic within the context of a single function call. IF-THEN-ELSE logic is a construct normally only found in programming languages, but it can be very useful in DonorQuest. You can think of it as providing a way for you to define your own functions. For example, the functionality of both the "Min()" and the "Max()" functions could be reproduced using the "If()" function. To replace the "Max()" function with a usage of the "If()" function, you would could make a call to "If()" which looks like this:

If(<Value1> > <Value2>, <Value1>, <Value2>)

The above "If()" expression says, "If <Value1> is greater than <Value2>, return <Value1>, otherwise return <Value2>." This accomplishes that same thing as:

Max(<Value1>, <Value2>)

In addition, the "If()" function is not limited to numeric and date values as the "Min()" and "Max()" functions are.

Example

The Mailing Label reports provide an excellent example of how the "If()" function may be used. When printing a mailing label, we wish to join together the First and Last names on a single line, with a single space between them. We could do this simply by entering:

.First_Name. + " " + .Last_Name.

for the Field/Name expression. If the first name is "John" and the last name is "Smith", this would print nicely as:

John Smith

with the " " providing a space between the two names. However, if the first name was Empty (such is the case when a company name is entered for the last name, and the first name field remains unused), the " " would cause a superfluous space to be printed before the last name like this:

Smith

To avoid this problem, the mailing label reports use a Field/Name expression like this:

.First_Name. + If(Empty(.First_Name.), "", " ") + .Last_Name.)

Here the "If()" expression will only place a space after the first name if there is a first name to print. Otherwise, it will place an empty character value ("") after the first name, which really amounts to nothing.

16.40 InFiscalYear()

Syntax

InFiscalYear(<DateValue>, <Year>)

Purpose

To determine if a specific calendar date falls within a specific fiscal year.

Parameters

<DateValue> is usually the name of a calendar date field in DonorQuest.

<Year> is a specific fiscal year.

Returns

InFiscalYear() will return true if <DateValue> falls within the fiscal year specified in <Year>, and false if it does not.

Usage

InFiscalYear() is a true/false function. InFiscalYear() is very similar to the FISCALYEAROF () function, but it differs in that it returns a true/false value instead of a year. Since InFiscalYear() returns a true/false (logical) value, it is designed more for use with selections than with reports.

Once you have told DonorQuest the starting month for your fiscal year, and the current fiscal year (via the fiscal year settings option described in section seventeen), DonorQuest will automatically keep track of the fiscal year donation totals for you. Also, DonorQuest will automatically increment the current fiscal year by one at the end of each fiscal year.

This fiscal year orientation of many organizations makes dealing with calendar dates difficult. For example, if you want to create a selection that would collect all the donations made in fiscal year 2016, you would normally have to create a complex date range condition to check if a given donation date "falls between" the actual calendar dates which make up fiscal year 2016.

The InFiscalYear() function alleviates much of this difficulty. In fact, since DonorQuest knows the beginning fiscal month for your organization, you don't even have to know the range of actual calendar dates which make up your fiscal year. The following InFiscalYear () expression would easily accomplish the selection described above:

Example

InFiscalYear(.Donation_Date., 2016)

You could also use InFiscalYear() with the CurrentFY() function to select all donations for the current fiscal year. The following line in a Custom selection would accomplish this:

InFiscalYear(.Donation_Date., CurrentFY())

16.41 InLists()

Syntax

InLists(<SpecificLists>)

Purpose

To determine whether a donor has one or more specific list codes in their history.

Parameters

<SpecificLists> is a character value containing any number of specific list codes, with each code separated by a comma.

Returns

InLists() will return true if one more of the <SpecificLists> is equal to one of the up to nine list codes a donor may have in their history. This true/false (logical) value is intended for use with selection conditions, and cannot be used directly in a report.

Usage

Recall from section one that List codes are used to store donor source code or "tag" information. List codes are basically used to "tag" a given donor in some way or other. For example, you may use the list codes to specify the list from which you got the donor's name. Establishing list codes makes it very easy to select subgroups of donors for specialized mailings. Up to nine list codes may be stored for each donor.

When creating Template or Custom selections, the InLists() function provides a convenient way to check all of a donor's nine list fields for specific codes. The InLists() function gives you the same capability which exists in the specific list code selection (covered in section two), but it does so using a single line in a Template or Custom selection definition.

Example

The following examples illustrate InLists():

CALL	RESULT
.List1.	ALUM (Alumni)
.List2.	STAF (Staff Member)
InLists("SOLT,BOAR,STAF")	True
InLists("SOLT,BOAR,MEDI")	False
InLists("ALUM")	True
InLists("STAF")	True

16.42 Int()

Syntax

Int(<NumericValue>)

Purpose

To remove the decimal part of a numeric value.

Parameters

<NumericValue> is the number you wish to strip the decimal places from.

Returns

Int() returns <NumericValue> without any decimal places.

Usage

In DonorQuest, the Int() function is basically used to remove cents from dollar amounts for certain reports. However, it may also be applied to calculations that result in long decimal values if the accuracy of this decimal is not desired. Note that Int() operates by removing--not rounding--all digits to the right of the decimal point.

Example

The following examples illustrate Int():

CALL	RESULT
Int(100.00)	Result: 100
Int(.5)	Result: 0
Int(-100.75)	Result: -100

16.43 IsAlpha()

Syntax

IsAlpha(<CharacterValue>)

Purpose

To determine if leftmost character in a character value is alphabetic. An alphabetic character consists of any uppercase or lowercase letter from A to Z. IsAlpha() returns false (.F.) if the character value begins with a digit or any other character.

Parameters

<CharacterValue> is the value to examine.

Returns

IsAlpha() returns a true/false (logical) value.

Usage

Because IsAlpha() returns a logical value, it is best suited for use with selections, not reports.

Example

The following examples illustrate IsAlpha():

CALL	RESULT
IsAlpha("AbcDe")	True
IsAlpha("aBcDE")	True
IsAlpha("1BCde")	False
IsAlpha(".FRED")	False

16.44 IsDigit()

Syntax

IsDigit(<CharacterValue>)

Purpose

To determine if leftmost character in a character value is a digit zero through nine.

Parameters

<CharacterValue> is the value to examine.

Returns

IsDigit() returns a true/false (logical) value.

Usage

Because IsDigit() returns a logical value, it is best suited for use with selections, not reports.

Example

The following examples illustrate IsDigit():

CALL	RESULT
IsDigit("AbcDe")	False
IsDigit("1abcd")	True
IsDigit(".12345")	False

16.45 IsLower()

Syntax

IsLower(<CharacterValue>)

Purpose

To determine if leftmost character in a character value is a lower case letter. It is the inverse of the IsUpper() function which determines whether a character begins with an uppercase character.

Both IsLower() and IsUpper() relate to the Lower() and Upper() functions which actually convert lowercase characters to uppercase, and vice versa.

Parameters

<CharacterValue> is the value to examine.

Returns

IsLower() returns a true/false (logical) value.

Usage

Because IsLower() returns a logical value, it is best suited for use with selections, not reports.

Example

The following examples illustrate IsLower():

CALL	RESULT
IsLower("aBcDe")	True
IsLower("AbcDe")	False
IsLower("1abcd")	False
IsLower("abcd")	True

16.46 IsSolMCFormat()

Syntax

IsSolMCFormat(<FieldName>)

Purpose

To determine if a character value is of solicitation memo code format.

Parameters

<FieldName> is usually always the memo code field.

Returns

IsSolMCFormat() returns a true/false (logical) value.

Usage

The IsSolMCFormat() function can be used to determine whether a given memo line has been used to store a solicitation entry. This is done by testing the code of the memo to see if it adheres to the solicitation memo code format.

IsSolMCFormat() can be useful for excluding solicitation information from donor memo history on reports. Of course it can also be used to produce reports which limit memo history to printing only solicitation-bearing memos.

Example

If the following expression is entered for field print condition column in a report, the column will only allow solicitation-bearing memos to print:

IsSolMCFormat(.Memo_Code.)

16.47 IsUpper()

Syntax

IsUpper(<CharacterValue>)

Purpose

To determine if leftmost character in a character value is an upper case letter. It is the inverse of the IsLower() function which determines whether a character begins with a lower case letter.

Both IsLower() and IsUpper() relate to the Lower() and Upper() functions which actually convert lowercase characters to uppercase, and vice versa.

Parameters

<CharacterValue> is the value to examine.

Returns

IsUpper() returns a true/false (logical) value.

Usage

Because IsUpper() returns a logical value, it is best suited for use with selections, not reports.

Example

The following examples illustrate IsUpper():

CALL	RESULT
IsUpper("AbCdE")	True
IsUpper("aBCdE")	False
IsUpper("$abcd")	False
IsUpper("8ABCD")	False

16.48 Julian_Date()

Syntax

Julian_Date(<DateValue>)

Purpose

To determine the number of days into a year a date is.

Parameters

<DateValue> is usually the name of a date field in DonorQuest.

Returns

The number of days into the year <DateValue> is.

Usage

This function can be used to convert date value to a numeric julian date. Julian dates do not have years, but serve as a count of the number of days that have passed between the first day and some arbitrary date in a particular year.

Example

The following examples illustrate JulianDate():

CALL	RESULT
Date()	03/07/2014
Julian_Date(Date())	65

16.49 LargestDonFor()

Syntax

LargestDonFor(<Condition>, <DonationExpr>)

Purpose

To retrieve information from the largest donation in a donor's history.

Parameters

<Condition> is any expression that evaluates to true or false. Only donations for which this condition is true will be considered when searching for the largest donation.

<DonationExpr> is the value you wish to retrieve from the largest donation. It can be an expression of any data type, and it is normally the name of a donation field.

Returns

The value of <DonationExpr> for the largest donation.

Usage

This function can be used to search donor history during a report or data export to retrieve information about the largest donation in each donor's history.

Example

If you wish to retrieve the amount of the largest donation made by each donor in calendar year 2017, you could use "LargestDonFor()" in the following manner:

LargestDonFor(Year(.Donation_Date.) = 2017, .Donation_Amount.)

16.50 LargestPlgFor()

Syntax

LargestPlgFor(<Condition>, <PledgeExpr>)

Purpose

To retrieve information from the largest pledge in a donor's history.

Parameters

<Condition> is any expression that evaluates to true or false. Only pledges for which this condition is true will be considered when searching for the largest pledge.

<PledgeExpr> is the value you wish to retrieve from the largest pledge. It can be an expression of any data type, and it is normally the name of a pledge field.

Returns

The value of <PledgeExpr> for the largest pledge.

Usage

This function can be used to search donor history during a report or data export to retrieve information about the largest pledge in each donor's history.

Example

If you wish to retrieve the amount of the largest pledge made by each donor in calendar year 2017, you could use "LargestPlgFor()" in the following manner:

LargestPlgFor(Year(.Pledge_Start_Date.) = 2017, .Pledge_Amount.)

16.51 LastDayOM()

Syntax

LastDayOM(<DateValue | MonthNumber>)

Purpose

To determine the number of days in a month.

Parameters

<DateValue | MonthNumber> designates either a date or the number of a month (months are numbered 1..12). If no parameter is specified, DonorQuest will assume you wish to know the number of days for the current month determined by the system date.

Returns

A numeric value which is the number of days in the specified date or month number.

Usage

To administer due dates and other similar dates, it is useful to know the number of days that remain in a month. Specify either the day's date or month as a parameter, and you get the length of the month in days. If you subtract the number of days until today's date, you are left with the days that remain until month end.

Example

The following examples illustrate CMonth():

CALL	RESULT
Date()	03/07/2017
LastDayOM(Date())	31
LastDayOM(2)	28

16.52 Last_Token()

Syntax

Last_Token(<CharacterField>, <Delimiter>)

Purpose

To extract the last word from a character field.

Parameters

<CharacterField> is the name of any character field in DonorQuest, such as the last or first name field.

<Delimiter> is usually a quoted space (" "). In general, <Delimiter> is whatever separates words within the field from which you wish to extract the last word. In most cases, words within fields are separated by a space, but you may also have fields in which commas or semicolons are used to separate words or groups of words.

Returns

The last word from within <CharacterField>.

Usage

Last_Token() can be used with reports to extract the last word from a field. But its power goes well beyond simply dealing with words within fields. The term "token" really applies to any part of a character field that is delimited by a special character or characters. This ability lets you extract any information you wish from within a field, as long as the information is delimited by a specific sequence of characters.

Since the second name field is generally used to store the full name of a partner or spouse (in the case of individual donors) or the name of the contact person for an organization, applying the Last_Token() function to the second name field would return the last name from within the second name field.

Example

The following example illustrates the use of Last_Token(). This example is based on an instance of the .Second_Name. being equal to "James A. Smith".

CALL	RESULT
.Second_Name.	James A. Smith
Last_Token(.Second_Name., " ")	Smith

16.53 Len()

Syntax

Len(<FieldName>)

Purpose

To determine the length of a field or character expression.

Parameters

The name of a field or a character expression.

Returns

A Numeric value.

Usage

When used together with the "Trim()" function, this function allows you to know the number of characters in a character field. Note that since all character fields are padded with spaces, it is necessary to "Trim" these spaces off using the "Trim()" function inside of the "Len()" function. Using the "Len()" function directly on a field will always yield the same numeric value -- the maximum number of characters the field can hold.

Example

You want to know all of the donors who have last names that are more than fifteen characters long. To do this you would create a Custom selection consisting of the following single condition:

Len(Trim(.Last_Name.)) > 15

16.54 LinkedDonorFor()

Syntax

LinkedDonorFor(<CharacterValue>)

Purpose

LinkedDonorFor() is a numeric function that returns the ID number of a donor who is linked to the current donor via a specific linkage code.

Parameters

A linkage code.

Returns

The ID number of a linked donor corresponding to the specified linkage code.

Usage

LinkedDonorFor() is primarily a reporting function which is used to fetch the ID number of a donor who is linked to the current donor via a specific linkage code. This ID number may then be used with other functions (such as the IDLookUp() function) to print information about the linked donor.

Example

The following examples illustrate LinkedDonorFor():

CALL	RESULT
LinkedDonorFor("FATHER")	236281
IDLookUp(LinkedDonorFor("FATHER"), .Last_Name.)	Weston
IDLookUp(LinkedDonorFor("FATHER"), .First_Name.)	James

If for the current donor there is no linked donor for a specific linkage code, then LinkedDonorFor() would return zero, and in the above example, IDLookup() would return nothing (resulting in nothing printing).

16.55 Lower()

Syntax

Lower(<FieldName>)

Purpose

To make fields appear as if all their data was entered in lower case.

Parameters

The name of a field or a character expression.

Returns

A Character value.

Usage

This function is the opposite of the "Upper()" function. It is useful when you wish to make all the letters in a field appear in lower case on a report or mailing label.

Example

The following examples demonstrate various results of Lower():

CALL	RESULT
Lower("STRING")	string
Lower(" 1234 CHARS = ")	1234 chars =
IDLookUp(LinkedDonorFor("FATHER"), .First_Name.)	Christopher

16.56 LTrim()

Syntax

LTrim(<FieldName>)

Purpose

To return the characters of a field, less any leading blank spaces.

Parameters

<FieldName> is the name of a field, or any character expression.

Returns

A Character value.

Usage

LTrim() is a character function used to format character values by removing any leading spaces. These can be, for example, numbers converted to character values using Str(). LTrim() is related to RTrim() which removes trailing spaces, and AllTrim() which removes both leading and trailing spaces. The inverse of AllTrim(), LTrim(), and RTrim() are the PadC(), PadR(), and PadL() functions which center, right-justify, or left-justify character values by padding them with fill characters.

16.57 Max()

Syntax

Max(<NumericValue1>, <NumericValue2>)
Max(<DateValue1>, <DateValue2>)

Purpose

To return the larger of two values.

Parameters

This function will determine the larger of two values. These values may be of either numeric, or date type. This function will only work with one type of value at a time. You can not give it a date and numeric value together to compare.

Returns

This function will return either a numeric, or a date value depending on what it is given to compare. If this function is asked to compare two numeric values, it will return the larger of the two numeric values. If asked to compare two date values, it will return the larger (most recent) of the two date values.

Usage

The Max() is useful when you wish to determine the larger of two numeric or date values. For example, say you want to print a report with a column you just invented which contains the greater of the two previous years of giving. To do this you would enter:

Max(.Donation_Total_For_Calandar_Year_1_Year_Ago., .
Donation_Total_For_Calandar_Year_2_Years_Ago.)

...for the report column's Field Name/Expression.

16.58 MemoTextFor()

Syntax

MemoTextFor(<MemoCode>)

Purpose

To retrieve the text of a memo with a specific memo code.

Parameters

<MemoCode> is the code that uniquely identifies the memo.

Returns

The contents of the memo text field for the memo entry which matches <MemoCode>.

Usage

The memo facility (described in section one) is very flexible. In addition to allowing you to enter general comments about each donor, the memo facility provides the easiest way to create user-defined fields. To create a user-defined field with memos, simply enter the name of the new field as the memo code for a new memo, and the value of the new field as the memo text.

When the memo facility is used to create new "fields", the MemoTextFor() function can be used to retrieve the value of these user-defined fields.

Example

The following example is based on three user-defined fields having been defined via the memo facility. They are called "MTASTE", "ORIGIN", and "HOBBY", and are used to store a donor's musical taste, ethnic origin, and favorite hobby, respectively.

CALL	RESULT
MemoTextFor("MTASTE")	Alternative Rock
MemoTextFor("ORIGIN")	German
MemoTextFor("HOBBY")	Stereo Equipment

16.59 Min()

Syntax

Min(<NumericValue1>, <NumericValue2>)
Min(<DateValue1>, <DateValue2>)

Purpose

To return the smaller of two values.

Parameters

This function will determine the smaller of two values. These values may be of either numeric, or date type. This function will only work with one type of value at a time. You can not give it a date and numeric value together to compare.

Returns

This function will return either a numeric, or a date value depending on what it is given to compare. If this function is asked to compare two numeric values, it will return the smaller of the two numeric values. If asked to compare two date values, it will return the smaller of the two date values.

Usage

The Min() is useful when you wish to determine the smaller of two numeric or date values. For example, say you want to print a report with a column you just invented which contains the lesser of the two previous years of giving. To do this you would enter:

Min(.Donation_Total_For_Calandar_Year_1_Year_Ago., .
Donation_Total_For_Calandar_Year_2_Years_Ago.)

...for the report column's Field Name/Expression.

16.60 Month()

Syntax

Month(<DateValue>)

Purpose

To determine the Month of the year for a given date value.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

Month() returns a number in the range of 0 to 12 as an integer numeric value. If the date parameter is empty (" / / "), Month() returns zero.

Usage

Month() is a date conversion function that is useful when you require a numeric month value during calculations for such things as periodic reports. Month() is a member of a group of functions that return components of a date value as numeric values. The group includes Day() and Year() to return the day and year values as numerics. CMonth() is a related function that allows you to return the name of the month from a date value.

Example

The following examples show the Month() function used in several; ways:

These examples illustrate returning the month of the system date:

CALL	RESULT
Date()	09/01/16
Month(Date())	9
Month(Date()) + 1	10

16.61 NamesOfStoredFilesForDonor()

Syntax

NamesOfStoredFilesForDonor(<cFileMask>)

Purpose

To retrieve the names of all stored files for a donor which match an optional file mask.

Parameters

<cFileMask> is a character value which must be enclosed in quotation marks. It can be used to limit the types of files returned, or to specify that only files beginning with a certain name be returned. For example, "*.pdf" would return the names of all PDF document files for the current donor. "Profile Picture*.jpg" would return all of the file names of picture files starting with the phrase "Profile Picture."

Returns

The file names are returned in a single tab-delimited character value, suitable for reporting or exporting.

Usage

On reports the NamesOfStoredFilesForDonor() function can be used to retrieve and print all files, or files meeting a certain file mask, for each donor.

Example

The following examples illustrate NamesOfStoredFileForDonor():

STORED FILES FOR DONOR
Audio file of speech donor gave at city council meeting.mp3
ConstituentNotes.doc
Profile picture of donor.jpg
Picture of donor at our top donor tribute dinner.jpg
Scan of letter donor sent us praising our work.pdf

CALL	RESULT
NamesOfStoredFilesForDonor(*.pdf)	Scan of letter donor sent us praising our work. pdf
NamesOfStoredFilesForDonor(*.jpg)	Main profile picture of donor.jpg <tab> Picture of donor at our top donor tribute dinner.jpg
NamesOfStoredFilesForDonor("Profile*.	Profile picture of donor.jpg

CALL	RESULT
jpg")	

16.62 NthSolCode()

Syntax

NthSolCode(<SolicitationNumber>)

Purpose

To retrieve the code for the nth solicitation.

Parameters

<SolicitationNumber> is the unique number for the desired solicitation. Solicitation numbers are generated in ascending order by DonorQuest, starting from 1 and going up to 999.

Returns

The code entered for the specified solicitation. Solicitation codes are usually the same as the campaign stimulus codes, or at least related to them in some way.

Usage

On reports the NthSolCode() function can be used to retrieve the stimulus code for the nth solicitation in each donor's history.

Example

The following examples illustrate NthSolCode():

MEMO CODE	MEMO TEXT
S000001	02/01/2011; GOLF ; Last Follow-Up: 05/15/2011; Number Of Follow-Ups: 4
S000002	02/01/2012; CAPTL; Last Follow-Up: 04/20/2012; Number Of Follow-Ups: 2

CALL	RESULT
NthSolCode(1)	GOLF
NthSolCode(2)	CAPTL

16.63 NthSolDate()

Syntax

NthSolDate(<SolicitationNumber>)

Purpose

To retrieve the date for the nth solicitation.

Parameters

<SolicitationNumber> is the unique number for the desired solicitation. Solicitation numbers are generated in ascending order by DonorQuest, starting from 1 and going up to 999.

Returns

The date entered for the specified solicitation.

Usage

On reports the NthSolDate() function can be used to retrieve the date for the nth solicitation in each donor's history.

Example

The following examples illustrate NthSolDate():

MEMO CODE	MEMO TEXT
S000001	02/01/2015; GOLF ; Last Follow-Up: 05/15/2015; Number Of Follow-Ups: 4
S000002	02/01/2016; CAPTL; Last Follow-Up: 04/20/2016; Number Of Follow-Ups: 2

CALL	RESULT
NthSolDate(1)	02/01/2015
NthSolDate(2)	02/01/2016

16.64 NthSolDLFollowUp()

Nth Solicitation, Date Of Last Follow-Up

Syntax

NTHSOLDLFOLLOWUP(<SolicitationNumber>)

Purpose

To retrieve the last follow-up date for the nth solicitation.

Parameters

<SolicitationNumber> is the unique number for the desired solicitation. Solicitation numbers are generated in ascending order by DonorQuest, starting from 1 and going up to 999.

Returns

The date of the last follow-up for the specified solicitation.

Usage

On reports the NTHSOLDLFOLLOWUP() function can be used to retrieve the date of the last follow-up phone call or mailing for the nth solicitation in each donor's history.

Example

The following examples illustrate NTHSOLDLFOLLOWUP():

MEMO CODE	MEMO TEXT
S000001	02/01/2011; GOLF ; Last Follow-Up: 05/15/2011; Number Of Follow-Ups: 4
S000002	02/01/2012; CAPTL; Last Follow-Up: 04/20/2012; Number Of Follow-Ups: 2

CALL	RESULT
NTHSOLDLFOLLOWUP(1)	05/15/2011
NTHSOLDLFOLLOWUP(2)	04/20/2012

16.65 NthSolNumFollowUps()

Nth Solicitation Number of Follow-Ups

Syntax

NTHSOLNUMFOLLOWUPS(<SolicitationNumber>)

Purpose

To retrieve the number of follow-ups made for the nth solicitation.

Parameters

<SolicitationNumber> is the unique number for the desired solicitation. Solicitation numbers are generated in ascending order by DonorQuest, starting from 1 and going up to 999.

Returns

The number of follow-up phone calls or mailings for the specified solicitation.

Usage

On reports the NTHSOLNUMFOLLOWUPS() function can be used to retrieve the number of follow-up attempts for the nth solicitation in each donor's history.

Example

The following examples illustrate NTHSOLNUMFOLLOWUPS():

MEMO CODE	MEMO TEXT
S000001	02/01/2011; GOLF ; Last Follow-Up: 05/15/2011; Number Of Follow-Ups: 4
S000002	02/01/2012; CAPTL; Last Follow-Up: 04/20/2012; Number Of Follow-Ups: 2

CALL	RESULT
NTHSOLNUMFOLLOWUPS(1)	4
NTHSOLNUMFOLLOWUPS(2)	2

16.66 NumYrsADonor

Number Of Years A Donor

Syntax

NumYrsADonor(<nStartingYear>)

Purpose

To retrieve the number of years a donor has been donating. Note that this is the total number of years in which any giving occurred, not necessarily the number of consecutive years in which giving occurred.

Parameters

<nStartingYear> is an optional starting year. It defaults to all years.

Returns

A count of the number of years in which giving occurred.

Usage

On DonorQuest reports and data exports, NumYrsADonor() can be used to retrieve a count of the number of years a donor has had any giving at all. You may optionally specify a starting year. For example, to determine the number of years in which a donor had giving starting in 2001, you would use NumYrsADonor() like this:

NumYrsADonor(2001)

16.67 OrgNameToID()

Syntax

OrgNameToID(<CharacterValue>)

Purpose

Given the name of an organization, the OrgNameToID() function will search your donor database for a constituent record with a matching organization name. If one is found, the DonorQuest ID number for the constituent will be returned. If no constituent record with a matching organization can be found, then zero will be returned.

Parameters

The name of the organization to search for.

Returns

A numeric value that is the unique ID number of a matching constituent record if one is found.

Usage

OrgNameToID() is generally used during the DonorQuest import process to fetch the ID number of constituents based on organization name, so it may be assigned to ID fields such as the Donation Soft Link, and the Linkage Linked To fields.

16.68 PadC()

Syntax

PadC(<FieldName>, <NumericValue>)

Purpose

To return the characters of a field, centered within a character value that is <NumericValue> characters long. The resulting character value will be lengthened by adding spaces on the left and right to make it <NumericValue> characters long. The spaces are added in such a way as to center any text within the character value.

Parameters

<FieldName> is the name of a field, or an expression of any type.

<NumericValue> is the total length you wish the resulting character value to be.

Returns

A Character value.

Usage

The "PadC()" function may be used to center text within a field of a report like this:

PadC(.Last_Name., 50)

If you were to enter the above "PadC()" expression for a Field Name/Expression of a report, the last names of donors would be centered within a report column which is fifty characters wide.

16.69 PadL()

Syntax

PadL(<FieldName>, <NumericValue>)

Purpose

To return the characters of a field, right-justified using a character value that is <NumericValue> characters long. The resulting character value will be lengthened by adding spaces on the left to make it <NumericValue> characters long.

Parameters

<FieldName> is the name of a field, or an expression of any type.

<NumericValue> is the total length you wish the resulting character value to be.

Returns

A Character value.

Usage

The "PadL()" function may be used to right-justify text within a field of a report like this:

PadL(.Last_Name., 50)

If you were to enter the above "PadL()" expression for a Field Name/Expression of a report, the last names of donors would be right-justified within a report column which is fifty characters wide.

16.70 PadR()

Syntax

PadR(<FieldName>, <NumericValue>)

Purpose

To return the characters of a field, left-justified within a character value that is <NumericValue> characters long. The resulting character value will be lengthened by adding spaces on the right to make it <NumericValue> characters long.

Parameters

<FieldName> is the name of a field, or an expression of any type.

<NumericValue> is the total length you wish the resulting character value to be.

Returns

A Character value.

Usage

The "PadR()" function may be used to left-justify text within a field of a report. Since character values are automatically left-justified within report columns, this function is mainly useful when you are combining two or more fields within a single report column. For example, if you wished to create a report column which contained the address left-justified, and the City right justified within the same report column, you could use the following expression for the report column Field Name/Expression:

.Address. + PadR(.City, 20)

Here the numeric value of 20 would allow for City names up to nineteen characters, leaving at least a single space to separate the address from the City.

16.71 PhoneNormalize()

Syntax

PhoneNormalize(<CharacterField>)

Purpose

To add the required formatting to a phone number.

Parameters

<CharacterField> can be the name of any character field in DonorQuest, but it is usually a name of a field in which a "raw" (unformatted) telephone number has been entered or imported.

Returns

PhoneNormalize() will return the contents of the specified character field with all digits assembled and formatted into a proper phone number of the form "(nnn) nnn-nnnn".

Usage

DonorQuest requires that telephone numbers be properly formatted for consistent searching and sorting. If you import telephone numbers from other programs which lack this discipline, it may be necessary to apply the PhoneNormalize() function to the imported telephone numbers.

To perform such a conversion, you would proceed by performing a selection for the donors with the newly imported telephone numbers. You would then use the replace command (see section seven) while viewing the selection result to apply the PhoneNormalize() function to the telephone fields which require it.

Of course, you could also keep the imported telephone numbers in their imported form if you wish, and simply use the PhoneNormalize() function with the report writer to have telephone numbers look nice on printed reports. However, these unformatted phone numbers would still be a problem during sorting and searching operations.

Example

The following examples illustrate PhoneNormalize():

CALL	RESULT
PhoneNormalize("4155728188")	(415) 572-8188
PhoneNormalize("5728188")	572-8188
PhoneNormalize("572-8188")	572-8188
PhoneNormalize("415 572-8188"	(415) 572-8188

16.72 PlgValFor()

Syntax

PlgValFor(<Condition>, <FieldExpr>)

Purpose

To retrieve the value of a pledge field or field expression for a specific pledge in a given donor's history.

Parameters

<Condition> is any expression which evaluates to true or false. This expression is used to tell PlgValFor() which pledge you wish to retrieve a value for. The condition should be very specific so that PlgValFor() can pinpoint the exact pledge you are interested in. For example, <Condition> could be used to select a pledge containing a certain comment in the pledge comment field, or perhaps a pledge made within a specific date range.

<FieldExpr> is the pledge field or field expression you wish PlgValFor() to return the value of for the specific pledge identified via the <Condition> parameter.

Returns

PlgValFor() will return the value of a pledge field or field expression for a specific pledge in a given donor's history. The type of data value returned by PlgValFor() will be the same as <FieldExpr>.

Usage

PlgValFor() can be used to "reach in" to a donor's pledge history to retrieve information from a specific pledge. For example, to create a report with a column containing the comment of the most recent pledge for each donor, you could use the following PlgValFor() expression:

Example

PlgValFor(.Pledge_Number. = .#_Pledges., .Pledge_Amount)

16.73 PostalCodeDistance()

Syntax

PostalCodeDistance(<cZip1>, <cZip2>)

Purpose

To determine the distance in miles between two postal (zip) codes.

Parameters

<cZip1> is a character value containing the digits of the first postal code (normally a 5 digit zip code).
<cZip2> is a character value containing the digits of the second postal code (normally a 5 digit zip code).

Returns

A numeric value with the distance in miles between the two points given by the two postal codes.

Usage

This convenient function may be used anywhere DonorQuest supports expressions, such as in Reports, data Exports, or language-oriented selection (query) definitions. For example, you could create a simple report which shows the local donors you plan to visit today, and arranges them on the report by how far they are from your office.

Example

The following example usage would produce a report or data export column which shows how far in miles each donor is from the fixed zip code 98109:

CALL	RESULT
PostalCodeDistance("98109", .Zip.)	30.5

16.74 PrintImage()

Syntax

PrintImage(<cPathAndFileName>)

Purpose

To print the contents of an image (picture) file at a specific position on a report.

Parameters

<cPathAndFileName> is a character value containing the path and name of the image file

to print. Currently, only .bmp (bitmap) files are supported.

Returns

True if image file is read ok, False if not.

Usage

This convenient function may be used in custom reports which require bitmaps (picture files) to be printed somewhere in the body of the report. For example, your organization's letterhead logo and other artwork could be printed at the top of the annual tax receipts DonorQuest can print for each donor. Likewise, a digital signature line (from a separate file) could be printed at the bottom of each receipt.

Example

The following example usage would read and print the bitmap stored in the file "ABC Organization Logo.bmp" at the current page position on a report as it is printing.

CALL	RESULT
PrintImage("ABC Organization Logo.bmp")	<image printed>

16.75 ReportCol()

Syntax

ReportCol(<ColumnNumber>)

Purpose

To acquire the value of another report column during the printing of a report.

Parameters

<ColumnNumber> is the number of the report column to acquire the value of during the printing of a report.

Returns

The value of the report column given by <ColumnNumber>.

Usage

This is a very convenient feature of the report writer. It allows you to incorporate values from adjacent report columns into the value of the current column. This capability is very similar to that of spreadsheet programs which allow you to define "cells" in terms of the cells around them. In DonorQuest, report columns can be thought of as "cells".

In the report writer, the column number for each field expression is shown to the left of the field expression (see figure 13.6 of section thirteen). This is the number you must use with

the ReportCol() function when referencing the value of a column in the report.

Example

The following examples draw on a hypothetical report of four columns containing each donor's first name, last name, donation total for current year, and donation total for last year:

CALL	RESULT
ReportCol(1)	John
ReportCol(2)	Smith
ReportCol(3)	250.00
ReportCol(4)	1500.00
ReportCol(3) + ReportCol(4)	1750.00

See Also:

ReportColSum(), ReportLine(), ReportPage()

16.76 ReportColSum()

Syntax

ReportColSum(<StartingColumn>, <EndingColumn>)

Purpose

To acquire the sum of the values of one or more numeric report columns during the printing of a report.

Parameters

<StartingColumn> is the starting column number for the range of numeric report columns to sum during the printing of a report.

<EndingColumn> is the ending column number for the range of numeric report columns to sum during the printing of a report.

Returns

The sum of the range of numeric report columns from <StartingColumn> through <EndingColumn>.

Usage

This is a very powerful feature of the report writer. It allows you to sum across report columns during the printing of a report. This capability is very similar to that of spreadsheet programs which allow you to define summation formulas that draw on a range of "cells". In DonorQuest, report columns can be thought of as "cells".

In the report writer, the column number for each field expression is shown to the left of the field expression (see figure 13.6 of section thirteen). This is the number you must use with the ReportColSum() function when referencing the value of a column in the report.

NOTE: The ReportColSum() function will only work with report columns of numeric type.

Example

The following examples draw on a hypothetical report of four columns containing each donor's first name, last name, donation total for current year, and donation total for last year:

CALL	RESULT
ReportCol(1)	John
ReportCol(2)	Smith
ReportCol(3)	250.00
ReportCol(4)	1500.00
ReportColSum(3, 4)	1750.00

See Also:

ReportCol(), ReportLine(), ReportPage()

16.77 ReportLine()

Syntax

ReportLine()

Purpose

To determine the current page line during the printing of a report.

Parameters

None.

Returns

The current page line number.

Usage

ReportLine() can be useful for drawing lines and other figures at specific lines on the printed report page. Used in conjunction with the "field print condition" attribute (covered in section thirteen on defining reports), specific information can be made to print on specific lines of each page.

See Also:

ReportPage()

16.78 ReportPage()

Syntax

ReportPage()

Purpose

To determine the current page number during the printing of a report.

Parameters

None.

Returns

The current page number.

Usage

ReportPage() can be useful when creating custom page headings for which you must know the current page number during the printing of a report. For more information on defining report page headings, please refer to section thirteen.

See Also:

ReportLine()

16.79 Replicate()

Syntax

Replicate(<CharacterValue>, <NumericValue>)

Purpose

To return <CharacterValue> repeated <NumericValue> times.

Parameters

<CharacterValue> is the character value to repeat.

<NumericValue> is the number of times to repeat it.

Returns

A Character value.

Usage

Designed for use in a report format definition, the "Replicate()" function is used to generate any number of occurrences of a sequence of one or more characters.

Examples

These examples demonstrate how "Replicate()" can repeat character values:

CALL	RESULT
Replicate("*", 5)	*****
Replicate("Hi ", 2)	Hi Hi
Replicate(CHR(42), 5)	*****
Replicate("!", 20)	!!!!!!!!!!!!!!!!!!!!
Replicate("-", 25)	-------------------------
Replicate("DonorQuest", 2)	DonorQuestDonorQuest
Replicate("* ", 10)	* * * * * * * * * *

16.80 Round()

Syntax

Round(<NumericValue>, <Number Of Decimals>)

Purpose

To round a numeric value to a specified number of digits.

Parameters

<NumericValue> is the number to round.

<NumberOfDecimals> is the number of decimal places to retain. Specifying a negative <NumberOfDecimals> value rounds whole number digits.

Returns

<NumericValue> rounded to <NumberOfDecimals>.

Usage

Round() is a numeric function that rounds <NumericValue> to the number of places specified by <NumberOfDecimals>. Specifying a zero or negative value for <NumberOfDecimals> allows rounding of whole numbers. A negative <NumberOfDecimals> indicates the number of digits to the left of the decimal point to round. Digits between five to nine, inclusive, are rounded up. Digits below five are rounded down.

Example

The following examples illustrate Round():

CALL	RESULT
Round(10.4, 0)	10.00
Round(10.5, 0)	11.00
Round(10.51, 0)	11.00
Round(10.49999999999999, 2)	10.50
Round(101.99, -1)	100.00
Round(109.99, -1)	110.00
Round(109.99, -2)	100.00

16.81 RRPrinted()

Syntax

RRPrinted()

Purpose

To determine how many report records have printed so far during the course of a report.

Parameters

None.

Returns

RRPrinted() will return a numeric value which is the total number of records which have actually been printed so far for the report currently in progress. This number may be less than the actual number of records processed (given by RRProcessed()) if the report format contains a conditional print expression which excludes one or more source records from the actual report printout.

Usage

RRPrinted() is intended solely for use within a running report. While its output may actually be printed, it is more likely you will use its value in a computed field formula, or to to implement any specialized logic you may have incorporated into the field print conditions of a report.

Example

The following examples illustrate the RRPrinted() function:

CALL	RESULT
RRPrinted()	<Number of records printed>
RRProcessed() - RRPrinted()	<Number of records skipped>

16.82 RRProcessed()

Syntax

RRProcessed()

Purpose

To determine how many report records have been processed so far during the course of a report.

Parameters

None.

Returns

RRProcessed() will return a numeric value which is the total number of records which have been processed so far for the report currently in progress. This number may be more than the number of records printed (given by RRPrinted()) if the report format contains a conditional print expression which excludes one or more source records from the actual report printout.

Usage

RRProcessed() is intended solely for use within a running report. While its output may actually be printed, it is more likely you will use its value in a computed field formula, or to implement any specialized logic you may have incorporated into the field print conditions of a report.

Example

The following examples illustrate the RRProcessed() function:

CALL	RESULT
RRProcessed()	<Number of records processed>
RRProcessed() - RRPrinted()	<Number of records skipped>

16.83 RTrim()

Syntax

RTrim(<FieldName>)

Purpose

To return the characters of a field, less any trailing blank spaces.

Parameters

<FieldName> is the name of a field, or any character expression.

Returns

A Character value.

Usage

The "RTrim()" function is provided mainly to be used with the "Len()" function to determine the actual number of data characters in a character field.

16.84 Seconds()

Syntax

Seconds()

Purpose

To Return the number of seconds elapsed since midnight.

Parameters

None.

Returns

Seconds() returns the system time as a numeric value in the form seconds.hundredths. The numeric value returned is the number of seconds elapsed since midnight, and is based on a twenty-four hour clock in a range from zero to 86399.

Usage

Seconds() is a time function that provides a simple method of calculating elapsed time during a report or other process should you wish to include such information on a report. The Seconds() function is based on the system clock, and is related to the Time() function which returns the system time as a character value in the form hh:mm:ss.

Example

The following examples illustrate Seconds():

CALL	RESULT
Time()	10:00:00
Seconds()	36000.00

16.85 SoftCount()

Syntax

SoftCount()

Purpose

To determine how many soft credit donations the current donor has.

Parameters

None.

Returns

SoftCount() will return the number of soft credit donations the current donor has on file.

Usage

Soft donation credit may be given to a donor for stimulating the giving of another donor. For example, let's say that John Smith lobbied IBM corporation for a gift of $1,000 which IBM gave. The actual $1,000 would go into IBM's history, and a soft credit reference to the $1,000 gift would go into John Smith's history. Because the $1,000 credit in John Smith's history is "soft", it is not included in his actual cash totals. However, it is on record.

SofCount() may be used in reports, data exports, selection conditions -- anywhere you need to know how many soft credit gifts a donor has.

16.86 SoftSum()

Syntax

SoftSum()

Purpose

To determine the sum of all soft credit donations in the current donor's history..

Parameters

None.

Returns

SoftSum() will return a numeric value which is the total of all donations for which the current donor has been given soft credit.

Usage

SoftSum() may be used anywhere you need the sum of all soft credits for the current donor.

Example

The following examples illustrate the SoftSum() function:

CALL	RESULT
SoftSum()	5426.28
.Donation_Total.	25785.25
SoftSum() + .Donation_Total.	31211.53

16.87 Space()

Syntax

Space(<NumericValue>)

Purpose

To return <NumericValue> space characters.

Parameters

<NumericValue> is the number of spaces you want.

Returns

A Character value.

Usage

Designed for use in a report format definition, the "Space()" function is used to generate any number of spaces. This can be useful when creating complex report column expressions involving more than one field. It can be used to force a set number of spaces to be present anywhere within a report.

Examples

You wish to combine the .Address. and .City. fields within a single report column, and you wish the .Address. field to always be followed by ten spaces, regardless of the respective lengths of the current .Address. and .City. fields. This would be accomplished by entering the following expression for the column Field Name/Expression:

.Address. + Space(10) + .City.



16.88 Sqrt()

Syntax

Sqrt(<NumericValue>)

Purpose

To determine the square root of a positive number.

Parameters

<NumericValue> is a positive number to take the square root of.

Returns

Sqrt() returns a numeric value calculated to sixteen decimal places. The number of decimal places actually displayed in a report can be controlled through the use of the Str() and/or Round() functions.

Usage

Sqrt() is a numeric function used anywhere in a numeric calculation to compute a square root (e.g., in an expression that calculates standard deviation). Though it has no direct application in DonorQuest, it is a standard mathematical function provided with most applications.

Example

The following examples illustrate Sqrt():

CALL	RESULT
Round(Sqrt(2), 5)	1.41421
Round(Sqrt(4), 5)	2.00000
Round(Sqrt(4), 5)	4.00000
Round(Sqrt(2), 5)	2.00000

16.89 StateForZip()

Syntax

StateForZip(<CharacterValue>, <NumericValue>)

Purpose

Given a specific zip code, this function will return the name of the state associated with the zip code. Normally only one state is associated with a zip code, but if multiple states are associated with the zip code, a specific associated state code may be fetched by passing the number of the desired associated state as the second parameter. Passing zero for the second parameter will cause the StateForZip() to return the number of states associated with the given zip code. Very few zip codes in the United States cross state lines.

Parameters

<CharacterValue> may be the name of any character field, but is usually the Zip field. A character (alpha-numeric) field is used for zip codes since they may contain a dash.

<NumericValue> is an optional parameter which specifies which state to return for the given zip code (most zip codes have only one state associated with them). If omitted, the first associated state will be returned. If passed as zero, then a count of the number of states associated with the given zip code will be returned.

Returns

The name of the state associated with the given zip code. Or, if <NumericValue> is zero, the number of states associated with the given zip code.

Usage

This function can be used with custom selections. For example, a custom selection could be written to find all the constituents in a zip code crossing multiple states, or dedicated to a single state.

Example

The following examples illustrate various results of StateForZip():

CALL	RESULT
StateForZip(.Zip., 0) > 1	True if zip borders crosses multiple states.
StateForZip(.Zip., 0) = 1	True if zip contained within a single state.
StateForZip("83864")	ID
StateForZip("83864", 0)	1
StateForZip("83864", 1)	ID

16.90 StateValidForZip()

Syntax

StateValidForZip(<cZip>, <cState>)

Purpose

Given a specific zip code and state abbreviation, this function will return true if the given zip and state are a valid combination to use in an address. When used in a custom selection, this function can identify the constituents in your database which have an invalid zip and state combination in their mailing address. Once in a selection result, these invalid addresses may then be viewed and corrected as a group. A typical custom selection expression using this function would be: StateValidForZip(.Zip., .State.)

Parameters

<cZip> Is the zip code to check. Must be a character (alpha-numeric) value since zip codes may contain a dash. In a custom selection, this is typically the .Zip. field, though it may be any field containing a zip code.

<cCounty> Is a character value giving the state abbreviation (in uppercase) to check. In a custom selection this is typically the .State. field, though it may be any field containing a state abbreviation.

Returns

A true/false value.

Usage

This function can be used with custom selections. For example, a custom selection could be written to find all the constituents which have an invalid zip and state combination in their main address.

Example

The following examples illustrate various results of StateValidForZip():

CALL	RESULT
StateValidForZip("83864", "ID")	True
StateValidForZip("83864", "WA")	False
StateValidForZip("60657", "IL")	True

16.91 StoredFileCountForDonor()

Syntax

StoredFileCountForDonor(<cFileMask>)

Purpose

To determine the number of stored files for a donor which match an optional file mask.

Parameters

<cFileMask> is a character value which must be enclosed in quotation marks. It can be used to limit the types of files which are counted, or to specify that only files beginning with a certain name be counted. For example, "*.pdf" would count the names of all PDF document files for the current donor. "Profile Picture*.jpg" would count the number of stored files for the current donor which start with the phrase "Profile Picture."

Returns

A number representing the count. Zero will be returned if the current donor has no stored files, or no files matching the specified file mask.

Usage

On reports and exports the StoredFileCountForDonor() function can be used to print the total number of stored files, or the total number of files meeting a certain file mask, for each donor. This function is also very useful in custom DonorQuest selections (queries). For example, you could create a selection of all the constituent records with any stored files at all with this one condition:

StoredFileCountForDonor() > 0

Likewise you could create a selection of all the constituents who have one or more stored PDF files using this one condition:

StoredFileCountForDonor("*.pdf") > 0

Further Examples

The following examples further illustrate StoredFileCountForDonor():

STORED FILES FOR DONOR
Audio file of speech donor gave at city council meeting.mp3
ConstituentNotes.doc
Profile picture of donor.jpg
Picture of donor at our top donor tribute dinner.jpg
Scan of letter donor sent us praising our work.pdf

CALL	RESULT
StoredFileCountForDonor()	5
StoredFileCountForDonor(*.pdf)	1
StoredFileCountForDonor(*.jpg)	2
StoredFileCountForDonor("Profile*.jpg")	1

16.92 Str()

Syntax

Str(<NumericValue1>, <NumericValue2>, <NumericValue3>)

Purpose

To return <NumericValue1> as a character value.

Parameters

<NumericValue1> is a numeric value that you wish to convert to character type.

<NumericValue2> is the length of the character value to return.

<NumericValue3> is the number of decimal places with which to format the numeric value before converting it to a character value.

Returns

A Character value.

Usage

This function allows you to take numeric fields (such as the .Donation_Total. field), and convert them to character values so that they may be combined with other character values.

Examples

During a report you wish to print the .Donation_Total. field within an opening and closing parenthesis. You could do this by entering the following expression for the Field Name/ Expression of a report column:

"(" + Str(.Donation_Total., 10, 2) + ")"

In this example, <NumericValue2> is 10, which will cause the .Donation_Total. to be formatted within a character value that is ten characters wide. <NumericValue3> is 2, which will cause the .Donation_Total. to be formatted to two decimal places (which is what we would want for dollars and cents).

The only problem with the above example is that the dollar amounts would always be right-justified within the ten character width. Because of this, the output would look like this:

```
(  45.78)
( 265.82)
( 2634.38)
( 87243.29)
```

... And so on. If we wished to eliminate any spaces after the opening parenthesis, we

could use the following expression:

"(" + LTrim(Str(.Donation_Total., 10, 2) + ")"

which would result in:

(45.78)
(265.82)
(2634.38)
(87243.29)

But what if we wanted the decimal points to still line up, and have no spaces between the opening parenthesis and the amount? We could use the following expression:

PadL("(" + LTrim(Str(.Donation_Total., 10, 2) + ")", 12)

With the above expression, we are using the "PadL()" function to right-justify the final result within a character value that is twelve characters wide (we use twelve since the open and close parenthesis require two additional spaces beyond the ten for the amount). The output would look like this on a report:

(45.78)
(265.82)
(2634.38)
(87243.29)

16.93 StrTran()

Syntax

StrTran(<CharacterValue1>, <CharacterValue2>, <CharacterValue3>)

Purpose

To return <CharacterValue1> translated in such a fashion that all occurrences of <CharacterValue2> within <CharacterValue1> are replaced by <CharacterValue3>.

Parameters

<CharacterValue1> is the character value to do translations within.

<CharacterValue2> is the value to find.

<CharacterValue3> is the value to replace the occurrences of <CharacterValue2> with.

Returns

A Character value.

Usage

This is a very powerful function, designed to perform a search-and-replace within a character value. This function gives you the ability to translate the contents of fields during a report.

Examples

When printing the contents of memo lines during a report, let's say you wanted to replace all occurrence of the key word "Music" with "**Music" to attract attention on the printed report. You could do this by entering the following expression for the report Field Name/ Expression of the report column containing the memo text:

StrTran(.Memo_Text., "Music", "**Music")

StrTran(.Note_Pad., "Tomorrow Never Knows", "Tomorrow Is Now")



16.94 Substr()

Syntax

Substr(<CharacterValue>, <Numeric1>, <Numeric2>)

Purpose

To return a portion of a field or character value.

Parameters

<CharacterValue> is the name of a field, or any character expression.

<Numeric1> is the starting position in <CharacterValue> to begin picking off characters at.

<Numeric2> is the number of characters to return.

Returns

A Character value.

Usage

Use "Substr()" when you only want to compare portions of character fields to specific character values of your own making.

Example

You want to know all of the donors who have "5432" as the last four digits of their zip code. You know that the zip code field contains ten characters (9 digits and a dash), so the last four digits must start at the seventh character position. So, what you really want to compare against "5432" is the next four characters starting from the seventh. To do this you would create Custom selection consisting of the following single condition:

Substr(.Zip., 7, 4) = "5432"

16.95 Sum_In()

Syntax

Sum_In(<Table>, <Condition>, <NumericExp>)

Purpose

The "Sum_In()" function was designed mainly for use with Custom selections. However, the numerical value it returns may be used with both Template selections, and within Report Format Definitions.

During a Custom selection, this function will "look" at all the donations, pledges, memos, or extra addresses for each donor. As it looks at each donation, pledge, memo, or extra address for the current donor in a selection, it will evaluate some condition defined by you. If that condition is true for the current donation, pledge, memo, or extra address, then "Sum_In()" will evaluate the Numeric expression defined by you, and add the resulting quantity to an ongoing sum which "Sum_In()" maintains internally as it is looking at each donation, pledge, memo, or extra address record for the current donor.

When "Sum_In()" is finished looking at all the donations, pledges, memos, or extra addresses for the current donor, it will return as its value the internally maintained sum.

Parameters

<Table> is the name of the table file (donation, pledge, memo, extra address, linkage, etc.) you wish "Sum_In()" to operate within for each donor during a selection. You must use one of the following names, exactly as they appear here:

.Donations.
.Pledges.
.Memos.
.Extra_Addresses.
.Links.

<Condition> is any expression that evaluates to be true or false. This expression is normally used to direct "Sum_In()" to only pay attention to those donations, pledges, memos, or extra addresses you are interested in. For example, if you wanted to ignore all donations that were made more than a year ago, you could use the following condition:

.Donation_Date. >= (DATE() - 365)

<NumericExp> is any expression which evaluates to a numeric value. Each time the <Condition> evaluates to true for the current donation, pledge, memo, or extra address, "Sum_In()" will increment its internal sum by the amount derived by evaluating <NumericExp>. With the above example using donations, if you specified:

.Donation_Amount.

for <NumericExp>, then for each donor during a selection, the "Sum_In()" function would return the total amount that each donor gave during the past year. This return value would

then be compared against some specific numeric value provided by you, and each donor would qualify for the selection only if that condition were met.

Returns

A Numeric value.

Usage

You can use this function to create selection conditions which will select donors based on donation, pledge, memo, and extra address history.

EXAMPLE 1

Suppose you want to know all donors who have five or more donations of any amount in their donation history. The following Custom selection condition using "Sum_In()" would do it:

Sum_In(.Donations., .T., 1) >= 5

The first parameter ".Donations." told Sum_In() that we want to look at the donation history for each donor.

The second parameter is usually a condition, but may be a specific value. Whichever the case, the second parameter must evaluate to a logical (true/false) value. Since we want to look at ALL donations for each donor, we want this parameter to always evaluate to true. In DonorQuest, the symbol ".T." means true, and ".F." means false. The Sum_In() function doesn't really care whether it gets an expression or not for the second parameter, all it's concerned about is getting something that is either true or false.

The third parameter is usually an expression, but may also be a specific value. The only proviso is that the third parameter evaluates to a numeric type. This number is added to the internal sum which is finally returned by "Sum_In()". As with the second parameter, "Sum_In()" doesn't care whether you really pass an expression or not. All "Sum_In()" cares about is that the third parameter evaluates to a number.

Given these parameters, for each donor the Sum_In() function will return the total number of donations in the donor's history. If that number is greater than five, then the donor will qualify for the selection.

EXAMPLE 2

Suppose you want to know all donors who have five or more donations of $50.00 or more each in their donation history. The following Custom selection condition using "Sum_In()" would do it:

Sum_In(.Donations., .Donation_Amount. >= 50.00, 1) >= 5

The first parameter ".Donations." told Sum_In() that we want to look at the donation history for each donor.

In this example the second parameter is an expression instead of a specific value. The expression is only true for donations of $50.00 or more, so the "Sum_In()" function will ignore all donations less than $50.00.

Since we want to count the number of donations of $50.00 or more, we will simply use "1" for the third parameter. When looking at the donation history of each donor, "Sum_In()" will add "1" to its internal sum each time it encounters a donation of $50.00 or more.

Given these parameters, for each donor the Sum_In() function will return the total number of donations of $50.00 or more in the donor's history. If that number is greater than or equal to five, then the donor will qualify for the selection.

EXAMPLE 3

Suppose you want to know all donors who have five or more donations of any amount, but only count those donations given in the past year. The selection condition is:

Sum_In(.Donations., .Donation_Date. >= (Date() - 365), 1) >= 5

The first parameter ".Donations." told Sum_In() that we want to look at the donation history for each donor.

The second parameter is an expression which is only true for donations which were made during the past year, so the "Sum_In()" function will ignore any donations older than that.

Since we want to count the number of donations for each donor made during the past year, we will again simply use "1" for the third parameter. When looking at the donation history of each donor, "Sum_In()" will add "1" to its internal sum each time it encounters a donation with a date equal to or more recent than today's date minus 365 days.

So, given these parameters, for each donor the Sum_In() function will return the total number of donations made during the past year in the donor's history. If that number is greater than five, then the donor will qualify for the selection.

EXAMPLE 4

Suppose you want to know all donors who have given a total of $500.00 or more during the past year. The selection condition would be:

Sum_In(.Donations., .Donation_Date. >= (Date() - 365),
.Donation_Amount) >= 500.00

The first parameter ".Donations." told Sum_In() that we want to look at the donation history for each donor.

The second parameter is an expression which is only true for donations which were made during the past year, so the "Sum_In()" function will ignore any donations older than that.

Since we want to total the actual Amounts for those donations satisfying the date condition in the second parameter, the third parameter is now an expression instead of the specific value "1" we have been using in previous examples. "Sum_In()" doesn't care what it gets

for the third parameter, provided it evaluates to a number. "Sum_In()" will dutifully sum the numeric value it gets from evaluating the third parameter for each donation which allows the second parameter to evaluate to true.

So, given these parameters, for each donor the Sum_In() function will return the dollar total for all donations made during the past year in the donor's history. If that number is greater than 500.00, then the donor will qualify for the selection.

EXAMPLE 5

Suppose you want to know all donors who have the key phrase "Phonathon III" in their memo history. You could tell DonorQuest to actually select donors based on the letters "Phonathon III" occurring anywhere in a donor's memo. Here's the "Sum_In()" expression to do it:

Sum_In(.Memos., "Phonathon III" $ .Comment_Text., 1) > 0

The first parameter ".Memos." told Sum_In() that we want to look at the Memo history for each donor.

The second parameter is an expression which is only true for memo lines which contain the character value "Phonathon III", so the "Sum_In()" function will ignore any memo lines which do not contain the value.

Since a donor will qualify if at least one of their memo lines contains the value "Phonathon III", we can simply let "Sum_In()" count the number of memo lines that do contain the value for each donor, and allow the donor to qualify for the selection if the number of memo lines "Phonathon III" occurred in is greater than zero. Using "1" as the third parameter will work nicely for allowing "Sum_In()" to simply count the number of memo lines for each donor containing the value.

16.96 Time()

Syntax

Time()

Purpose

To determine the current time according to the system clock.

Parameters

None.

Returns

Time() returns the system time as a character value in the form hh:mm:ss. hh is hours in 24-hour format, mm is minutes, and ss is seconds.

Usage

Time() can be used in report headings to print the time in hours, minutes, and seconds that a particular report is run.

Example

The following examples illustrate Time():

CALL	RESULT
Time()	10:37:17
Substr(Time(), 1, 2)	10
Substr(Time(), 4, 2)	37
Substr(Time(), 7, 2)	17


POLICE PUBLIC CALL BOX

16.97 Token_Pos()

Syntax

Token_Pos(<CharacterField>, <Word>, <Delimiter>)

Purpose

To determine the starting character position of a specific word in a character field.

Parameters

<CharacterField> is the name of any character field in DonorQuest, such as the last or first name field.

<Word> is the number of the word to determine the starting position of.

<Delimiter> is usually a quoted space (" "). In general, <Delimiter> is whatever separates words within the field from which you wish to extract a single word. In most cases, words within fields are separated by a space, but you may also have fields in which commas or semicolons are used to separate words or groups of words.

Returns

A numeric value.

Usage

Token_Pos() currently has no direct application for the user in DonorQuest. It is an internal function which may become useful at the user level as the program is expanded.

16.98 Token_Count()

Syntax

Token_Count(<CharacterField>, <Delimiter>)

Purpose

To count the number of words in a character field.

Parameters

<CharacterField> is the name of any character field in DonorQuest, such as the last or first name field.

<Delimiter> is usually a quoted space (" "). In general, <Delimiter> is whatever separates words within the field in which you wish to count the number of words. In most cases, words within fields are separated by a space, but you may also have fields in which commas or semicolons are used to separate words or groups of words.

Returns

The number of words in <CharacterField>.

Usage

Token_Count() can be used very simply to count the number of words in a character field. Word counts can be useful if you wish to design a selection that identifies all the donors who have a certain number of words in a particular field. As with the other "token" functions, the power of Token_Count() goes well beyond simply dealing with words within fields. The term "token" really applies to any part of a character field that is delimited by a special character or characters. It could, for example, count the number of semicolon-delimited character groupings in a field.

Example

Being able to determine the number of words in a field can be quite useful. For example, the donor type field is normally used to designate the type of a donor -- usually individual or organization. However, after importing data from another program which does not have a donor type field, you would normally have to do manual data entry on each imported record to properly set the donor type field.

Alternatively, you could use Token_Count() to identify the imported records which have more than one word in the last name field -- they have a very high probability of being organizations. For those donors, you could then do an automatic replacement of the donor type field with "O" for organization. Similarly, you could identify the imported record with a single word in the last name field, and do an automatic replacement of the donor type field with "I" for individual.

The following example shows how to use Token_Count() to count the number of words in the last name field:

CALL	RESULT
.Last_Name.	Intrepid Systems
Token_Count(.Last_Name., " ")	2

16.99 UGet()

Syntax

UGet(<StorageLocation>)

Purpose

To retrieve a user-stored value of any type.

Parameters

<StorageLocation> is the location of a specific value to retrieve. The <StorageLocation> is always an integer numeric value (1, 2, 3, 4, etc.).

Returns

The value which was stored to <StorageLocation> by the UPut() function (described later in this appendix).

Usage

The UGet() function is designed specifically to be used in conjunction with the UPut() function. The UPut()/UGet() pair of functions allow you to store and retrieve values of any type during a report or selection in DonorQuest. These are very advanced functions, mainly designed to be used with custom selections.

Very basically, the UPut()/UGet() functions allow you to store and retrieve temporary values, much like the memory function on a hand-held calculator allows you to temporarily store intermediate results with the memory key. Note that the values you store and retrieve with the UPut()/UGet() functions are temporary -- they will be gone when you exit DonorQuest.

Example

When defining Custom selections, you may occasionally need to create very complex conditions. These conditions can become very long -- especially if you make use of the SUM_IN() function. For such conditions, it is often easier to break a complex condition down into intermediate results which you would store via the UPut() function. Then, the results of the complex conditions would be readily available via the UGet() function.

The following examples begin to illustrate UPut() and UGet(). For more information, please refer to the UPut() function:

CALL	RESULT
UPut("Memory Is Precious", 1)	Memory Is Precious
UPut(3.141592654, 2)	3.141592654
UGet(1)	Memory Is Precious
UGet(2)	3.141592654

16.100 Upper()

Syntax

Upper(<FieldName>)

Purpose

To make fields appear as if all their data was entered in upper case.

Parameters

The name of a field, or a character expression.

Returns

A Character value.

Usage

This function is useful when you want to compare the contents of character fields in selection conditions without having to worry about proper capitalization.

Example

You want to know all the donors with a last name of "Smith". "Upper()" will allow you to create a selection condition that could look at all the last names as if they were all upper case. This is very convenient since you need to account for the data entry person having accidentally entered "smith" instead of "Smith". Using the "Upper()" function would enable you to set up a condition like this:

Upper(.Last_Name.) = "SMITH"

Notice how we used all upper case letters for the specific value "SMITH" in the condition.

16.101 UPut()

Syntax

UPut(<StorageValue>, <StorageLocation>, <ReturnValue>)

Purpose

To store a value of any type.

Parameters

<StorageValue> is the value to store. It can be of any data type (character, numeric, date, etc.).

<StorageLocation> is the location to store the value in. The <StorageLocation> is always an integer numeric value (1, 2, 3, 4, etc.). You can think of it like an address on a mail box.

<ReturnValue> is an optional parameter. It allows you to tell UPut() to return a specific value. This can be useful when using UPut() with custom selection conditions. Since you would normally occupy an entire condition line with a single usage of UPut() in a selection definition, you would need UPut() to return true (.T.) so that its use would have no effect on the outcome of the selection. If <ReturnValue> is omitted, UPut() will return <StorageValue>.

Returns

As explained above, the return value of UPut() depends on whether you specify anything for <ReturnValue>. If you do, that will be the value returned by UPut(). If you do not, UPut() will return <StorageValue>.

Usage

The UPut() function is designed specifically to be used in conjunction with the UGet() function. The UPut()/UGet() pair of functions allow you to store and retrieve values of any type during a report or selection in DonorQuest. These are very advanced functions, mainly designed to be used with custom selections.

Very basically, the UPut()/UGet() functions allow you to store and retrieve temporary values, much like the memory function on a hand-held calculator allows you to temporarily store intermediate results with the memory key. Note that the values you store and retrieve with the UPut()/UGet() functions are temporary -- they will be gone when you exit DonorQuest.

Example

When defining Custom selections, you may occasionally need to create very complex conditions. Since these conditions can become very long -- especially if you make use of the SUM_IN() function. For such conditions, it is often easier to break a complex condition down into intermediate results which you would store via the UPut() function. Then, the results of the complex conditions would be readily available via the UGet() function.

The following examples further illustrate UPut() and UGet(). For more information, please refer to the UGet() function:

CALL	RESULT
UPut("Memory Is Precious", 1)	Memory Is Precious
UPut(3.141592654, 2)	3.141592654
UPut("Memory Is Precious", 1, .T.)	True
UPut(3.141592654, 2, .T.)	True
UGet(1)	Memory Is Precious
UGet(2)	3.141592654

16.102 Val()

Syntax

Val(<FieldName>)

Purpose

To convert character fields to numeric type.

Parameters

The name of a character field, or a character expression.

Returns

A Numeric Value.

Usage

This function is useful when you want to compare the contents of character fields with specific values or expressions of numeric type, or when you wish to perform arithmetic operations on character fields.

Example

You want to know all the donors with a code number of one. You're not sure whether your data entry person has been entering the code one's as "1__", "_1_", "__1", or "001". Normally, you would have to check each of the three cases individually, using an .OR. connector like this:

(.Code. = "1 ") .OR. (.Code. = " 1 ") .OR.
(.Code. = " 1") .OR. (.Code. = "001")

Using the "Val()" function, all you would have to do is convert the contents of the code field to a number, and then compare what the "Val()" function returns to a literal number 1 like this:

Val(.Code.) = 1

Notice that we did not surround the 1 in quotes, because it is a specific numeric rather than character value. Note that if there were alpha characters (letters) in the code field, the "Val()" function would only return as its value the first few numeric characters which occur before the first non-numeric character. For example, Val("1Y2") would return a numeric value of one, and not twelve.

16.103 XAdValFor()

Syntax

XAdValFor(<Condition>, <FieldExpr>)

Purpose

To retrieve the value of an extra address field or field expression for a specific extra address in a given donor's history.

Parameters

<Condition> is any expression which evaluates to true or false. This expression is used to tell XAdValFor() which extra address you wish to retrieve a value for. The condition should be very specific so that XAdValFor() can pinpoint the exact extra address you are interested in. For example, <Condition> could be used to select an extra address containing a certain value in the extra address code field, or perhaps an extra address with a specific date window for mailing.

<FieldExpr> is the extra address field or field expression you wish XAdValFor() to return the value of for the specific extra address identified via the <Condition> parameter.

Returns

XAdValFor() will return the value of an extra address field or field expression for a specific extra address in a given donor's history. The type of data value returned by XAdValFor() will be the same as <FieldExpr>.

Usage

XAdValFor() can be used to "reach in" to a donor's extra address history to retrieve information from a specific extra address. For example, to create a report with a column containing the summer mailing address of each donor, you could use the following XAdValFor() expression:

Example

XAdValFor(.XA_Code. == "SUMR", .XA_Address.)

Note that the above example requires that summer extra addresses have the code "SUMR" entered for the extra address code field.

16.104 Year()

Syntax

Year(<DateValue>)

Purpose

To determine the Year of a given date value.

Parameters

<DateValue> may be the name of a date field (such as the .Donation_Date. field), but it may also be any value of Date type -- such as the current date returned by the "Date()" function.

Returns

A numeric value.

Usage

Year() returns the year of the specified date value including the century digits as a four-digit numeric value. A field with an Empty date returns zero. Year() is a member of a group of functions that return components of a date value as numeric values. The group includes DAY() and MONTH() to return the day and month values as numeric values.

Example

The following examples show the Year() function used in several; ways:

CALL	RESULT
.Donation_Date.	09/20/2014
Year(.Donation_Date.)	2014
Year(.Donation_Date.) + 8	2022

This example uses Day() in combination with CMonth() and Year() to format a donation date value for the Report Writer:

CMonth(.Donation_Date.) + Str(Day(.Donation_Date.)) + ", " + Str(Year(.Donation_Date.))

The result would be similar to:
September 20, 2014

16.105 ORG...()

Syntax

OrgName()

Purpose

The OrgName(), OrgAddress(), OrgCity(), OrgState(), OrgZip(), and OrgPhone() series of functions return the name, address, city, state, zip, and telephone number for your organization.

Parameters

None.

Returns

The name, address, city, state, zip code, and phone number for your organization.

Usage

These functions are intended primarily to be used in reports. They provide a convenient way to create generic reports which contain organization-specific information, but which can be imported and used by any organization. The "invoicing from pledges" series of reports provide examples of how these functions are used. In order for these functions to return the correct information for your organization, you must have set your organization's information. To setup your organization's information in DonorQuest, or to simply confirm the information which has been entered, select Your Organization's Information off the System Configuration menu.

Example

The following examples illustrate the Org() series of functions:

CALL	RESULT
OrgName()	Intrepid Systems, Inc.
OrgAddress()	701 Galer Street, Suite 504
OrgCity()	Seattle
OrgState()	WA
OrgZip()	98109
OrgPhone()	800 952-8228

Topic XVIII

17 System Maintenance

System...

Most system maintenance features apply only if you are running the in-house version of DonorQuest, but a few are still relevant in the online version.

Most System Maintenance operations are designed to keep DonorQuest running smoothly. Some are designed to repair problems which can occur if you are running DonorQuest on a network and you are not using the client/server mode of operation DonorQuest offers. If you are running DonorQuest on a network and have a large database (and/or a very slow network), you should enable the client/server mode of operation by activating the DonorQuest Server Component. This will move all data-intensive operations to the file server where they can be most efficiently and securely implemented. If you are not running the DonorQuest Server component, and you are using DonorQuest on a network, you are requiring DonorQuest to move a lot of information across the network connection between your workstation and the file server. Depending on the speed of your Local Area Network, this is ok for fairly small donor databases less than 80,000 donors or so, but for larger databases you should consider engaging the DonorQuest Server Component.

17.1 Auto-Set Next Available Donor ID

System, Auto-Set Next Available Donor ID

As you have probably noticed, DonorQuest automatically assigns an ID number when you add a new donor. To do this, DonorQuest keeps track of the largest ID number currently in use. When you add a new donor, the new donor gets this largest ID number plus one, and DonorQuest then keeps track of the new "largest" ID number.

Selecting Auto-Set Next Available Donor ID from the System menu will tell DonorQuest to look at all donors in your database, searching for the largest ID number in use. Once this is found, DonorQuest will set the Next Available Donor ID to this number, plus one. So the next new donor you add will be assigned an ID larger than any existing donor. This is convenient since having only new, never-before-used donor ID's always allocated means that ordering your donors by their ID will also put them in the chronological order in which they were added.

The Configure, Program Settings dialog in DonorQuest allows you to set the Next Available Donor ID to anything -- even 1. This would cause DonorQuest to be recycling the old ID numbers of deleted donors. DonorQuest would never assign an ID number that is currently in use by an existing donor, so if the Next Available ID is actually in use, DonorQuest would add one to it, check again, and repeat until it found an unused ID. But this practice of recycling old ID's is not recommended and totally unnecessary since the range of ID numbers DonorQuest supports goes up to 999,999,999,999. Providing access to the Next Available Donor ID in the Program Settings dialog is really intended to allow you to set the ID allocation forwards. For example, if you have just imported all the data from

your old fundraising system into DonorQuest, and your old system had used ID's 1...45,327, you might choose to set the Next Available ID in DonorQuest to 50,000 just to make a clean break with the old system. That way, looking at any donor record you would be able to immediately know whether it came from your old system, or was created new in DonorQuest.

17.2 Auto-Fill Empty Salutation And County Fields

System, Auto-Fill Empty Salutation And County Fields

The Salutation fields are used for all correspondence with your donors and prospects. The Salutation 1 is used for the first line of the address block in letters and labels, and the Salutation 2 is used in the "Dear" block of mail merged letters and emails. These fields need to be filled in when adding a new donor record. Having the Auto-Fill Blank Salutations On Record Save feature turned on in the DonorQuest Program Settings is a really good idea, but it will not help with old records which may have been created without salutation entries. The Auto-Fill Empty Salutation And County Fields option of the DonorQuest System menu will process your entire database, filling in missing salutations. All existing salutation entries will be preserved, only empty salutation fields will be filled in.

17.3 Recompute Totals

System, Recompute Totals

DonorQuest stores certain information in the biographical (Header) table which it uses internally to paint displays quickly. If you ever experience any power failure or other network disruption, it is possible these totals may be out of synch with the rest of the database. When this happens, you should click on System, Recompute Totals. You must be the only user logged into DonorQuest to run this. You will receive a single confirmation prompt before the process begins.

17.4 Recount Active Records

System, Recount Active Records

When you delete donor information in DonorQuest, the affected records are not immediately physically deleted. They are instead hidden from view. This allows for accidentally deleted records to be restored. It's a bit like the recycle bin for files in Windows. However these records have to be continually skipped over on status displays showing percent completes for various processes. If for any reason the count of active records becomes out of synch with the database, status displays may show slightly more records to process than there really are. To correct this if it ever happens, click on System, Recount Active Records.

Note that if you are running DonorQuest on an in-house network, you should enable the client/server mode of operation by activating the DonorQuest Server Component. This will move all data-intensive operations to the file server where they can be most efficiently and securely implemented. If you are not running the DonorQuest Server component, and you are using DonorQuest on a network, you are forcing DonorQuest to move a lot of information across the network connection between your workstation and the file server. Doing so will stress your network, slow DonorQuest performance, and make it more likely that any instabilities in your network will surface to cause problems.

17.5 Check For Orphan Donations

System, Check For Orphaned Donations

This feature only applies to the in-house version of DonorQuest. Orphan donations can never occur with the online version of DonorQuest.

If a workstation were to lose network connectivity during the deletion of a donor account, it could result in orphaned donations - donations which exist in the database, but which have no associated donor account. To detect and remove any such donations, click on System, Check For Orphaned Donations.

Note that if you are running DonorQuest on a network, you should enable the client/server mode of operation by activating the DonorQuest Server Component. This will move all data-intensive operations to the file server where they can be most efficiently and securely implemented. If you are not running the DonorQuest Server component, and you are using DonorQuest on a network, you are forcing DonorQuest to move a lot of information across the network connection between your workstation and the file server. Doing so will stress your network, slow DonorQuest performance, and make it more likely that any instabilities in your network will surface to cause problems.

17.6 Check For Duplicate Donor ID Numbers

System, Check For Duplicate Donor ID Numbers

This feature only applies to the in-house version of DonorQuest. Duplicate donor ID numbers can never occur with the online version of DonorQuest.

Records with duplicate donor ID's should never be created if you are running on a reliable network. However if have had any network issues, it is a good idea to run this check. If duplicates are found, and there are too many to correct by manually re-entering the donor records as new donors, then you should restore from the last good backup of your data you have before your network issues began.

17.7 Check For Unlinked Selection Result Tables

System, Check For Unlinked Selection Result Tables

This feature only applies to the in-house version of DonorQuest. Unlinked selection results can never occur with the online version of DonorQuest.

If you copy your DonorQuest installation to a new computer, use it for a while, then copy the installation back to the first computer without first deleting the DonorQuest installation that was originally there, you will wind up with a mixture of old and new files. Selection Result files which DonorQuest deleted on the second computer could now be "back." This will cause a problems with creating new Selection Results. To get rid of the old result files which should no longer be there, click on System, Check For Unlinked Selection Result Tables. Allow DonorQuest to delete any that are found.

17.8 Renew Pledges Due for Renewal

System, Renew Pledges Due For Renewal

The Renew Pledges Due For Renewal option will scan all pledge records for all donor accounts. All pledges that have expired and qualify for renewal will be renewed by this process. When pledges are renewed, a new and identical pledge is created (leaving the existing one intact), with new begin and end dates which span the same amount of time as the original pledge. The renewal process is convenient when using the pledge facility to accommodate recurring payments, such as annual membership dues for special clubs or associations. A given pledge will qualify for renewal if:

1. The Renew checkbox for the pledge is turned on.
2. The pledge has not been previously renewed.

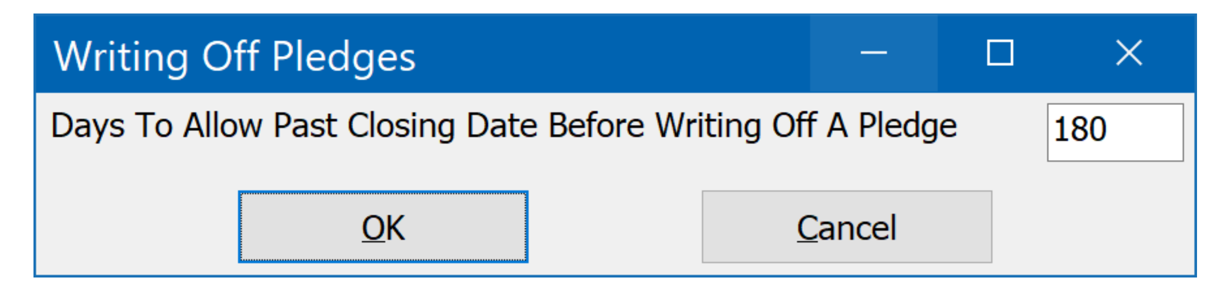
To run this process, click on System, Renew Pledges Due For Renewal. While this operation is not technically a system maintenance operation, it is placed here because it is an operation which can make sweeping data changes, and is therefore reserved for those DonorQuest users who's user rights allow them an elevated level of access to the database via the System menu.

17.9 Writing Off Pledges

System, Write Off Pledges

When pledges are not fulfilled as promised, they should eventually be written off so that the donor will not receive any additional payment reminders, and the remaining pledge balance will no longer show up on the DonorQuest revenue forecasting reports. To write

off pledges, click on System, Write Off Pledges. You will be asked to enter the number of days past the closing date to allow before writing off a pledge:



Generally 180 is sufficient, but this depends on the preferences of your organization. Generally if it has been 180 days past the ending date set for a pledge to be paid by, and the pledge remains unpaid, it is unlikely it will be fulfilled. However some organizations prefer to give donors a year or more past the end date of a pledge to make good on an unpaid pledge.

When a pledge is written off, it still remains in the donor's account, showing the original promised amount, and how much (if anything) was actually paid.

While this operation is not technically a system maintenance operation, it is placed here because it is an operation which can make sweeping data changes, and is therefore reserved for those DonorQuest users who's user rights allow them an elevated level of access to the database via the System menu.

17.10 Remove Archived Donors From Active Area

System, Remove Archived Donors From Active Area

The COPY command of the Main Information window allows you to copy all information about a donor to the Archive dataset of DonorQuest. Normally, you should delete a donor after creating a copy of their information in the Archive area, so that they do not exist in both places at once. If you do not delete them, then you will have a copy of their information in both the Donor dataset (where all your active donor information is stored) and the Archive dataset. The System, Remove Archived Donors From Donor Active Area option will search through the donor dataset, deleting those donors who have been copied to the archive dataset, but have not been deleted from the donor dataset.

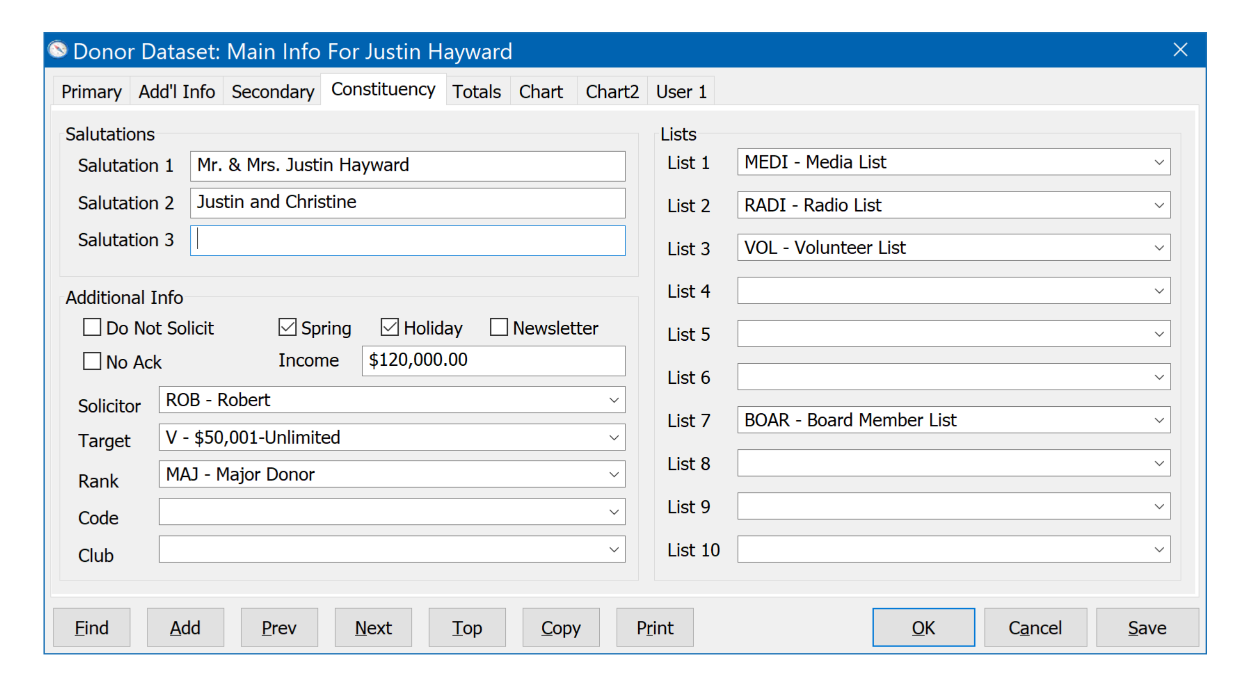
Warning: If you archive a donor and then add new information (such as a new donation) to their history, the new information will be lost if you run this process without first de-archiving the donor, adding the new information, and then re-archiving them. To de-archive a donor, you must look them up in the Archive dataset and copy them back to the Donor dataset. If you are de-archiving a donor solely for the purpose of making a change to their history, and you plan to immediately re-archive them, then you can save yourself this step by making the change to the donor's history directly in the Archive dataset. To do this, temporarily change the default dataset to be Archive by clicking on File, Open, Archive. When you are finished working in the Archive dataset, you can switch back to the Donor

database by clicking on File, Open, Donors.

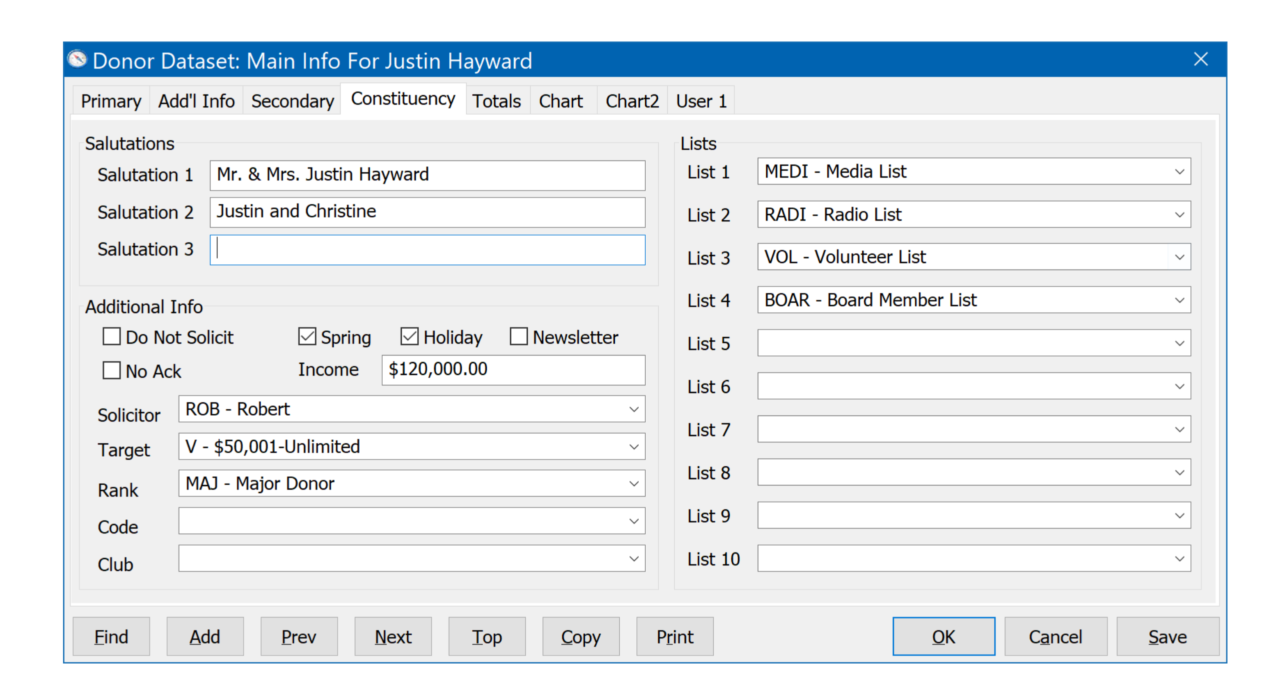
17.11 Remove Intervening Blank List Codes

Remove Intervening Blank List Codes

DonorQuest has ten dedicated list code fields used to store donor source code or "tag" information. Normally, additional list codes are added to each donor account starting with List1, List2, List3, etc. Over time, some of the list codes for donors may be intentionally blanked out (effectively removing them), resulting in intervening blank list codes. Clicking on System, Remove Intervening Blank List Codes will process all donor records, removing any blank list codes which occur. For example, consider a donor with the following list codes:



After removing intervening blank list codes, the donor's list codes would be as follows:



17.12 Rebuild Zip Code Table

System, Rebuild Zip Code Table

This process will expand the zip code table provided with DonorQuest to include any unique City/State/Zip/County combinations not already known to DonorQuest. This is done by searching all the names and addresses you have entered in DonorQuest so far. Note that the National Zip Code Table provided with DonorQuest is very comprehensive, so this is really only necessary if your DonorQuest-provided zip code table is out-of-date, or if you wish to populate it with your local Postal Codes (appropriate for International users). This process is run by clicking on System, Rebuild Zip Code Table. You will also be given the option of purging the existing zip code table before proceeding. This will completely remove the Nation Zip Code information provided with DonorQuest. Doing this is appropriate only if you are not using United States zip codes at all, or if you have not updated DonorQuest in several years and the National Zip Code Table provided with DonorQuest is very out-of-date.

17.13 Delete Temporary Files

System, Delete Temporary Files

This feature only applies to the in-house version of DonorQuest. Undeleted temporary files can never be an issue with the online version of DonorQuest.

During the course of normal operations, DonorQuest will create files that it uses to store temporary information in. DonorQuest will automatically delete these files as part of it's normal maintenance routines. However, if you are running low on disk space and need to free up some space right away, you can ask DonorQuest to immediately delete the temporary files it does not absolutely need. It's a bit like clearing the cache on your browser. To have DonorQuest delete it's temporary files, click on System, Delete Temporary Files.

17.14 Delete Duplicate Memos

System, Delete Duplicate Memos

DonorQuest Memos are a convenient place to import some of the odd data that may exist in other software programs for which there is no clearly appropriate corresponding pre-defined field in DonorQuest. However, depending on how you do the import and how clean the data source is, this may result in duplicate memo entries being created. These can be easily removed after completing the data import by clicking on System, Delete Duplicate Memos.

17.15 Running A Local Backup

System, Run Local Backup

The local backup feature of DonorQuest is mainly designed to protect you from user errors -- such as doing a mass data replace by mistake, or incorrectly updating a large number of donor records via a data import. The local backup simply creates a redundant copy of all the critical DonorQuest files on the file server on which DonorQuest is installed (or your local hard drive if you are running DonorQuest locally on your machine). Before you do any major sweeping data change or data import, you should click on System, Run Local Backup to create a restore point. Even though the online version of DonorQuest is backed up every night, this is a way to create a restore point that has up to the minute data. To restore from such a backup using the online version, you would need to issue a support request in writing (via email) to have your database restored. Note that it is also possible to direct routine backups to your local computer or network by creating one or more automated export actions in DonorQuest. You may also do an immediate export of your entire database by clicking on File, Export, All Donor Data. This requires the Export right to be enabled in your DonorQuest user account.

For those using the in-house version, DonorQuest will run the local backup process for you automatically every week. If you are running DonorQuest in client/server mode on a network, then the DonorQuest server component will run the backup automatically at night. If the DonorQuest server component is not running on your server (or you are are not running DonorQuest on a network), then when it is time for the weekly backup DonorQuest will display a prompt on your workstation asking if it can run the backup. This prompt will be displayed when you are closing DonorQuest. You should allow it to run unless you need to shut your machine down right away. All DonorQuest users in your

organization will be asked each time they close DonorQuest to run the weekly backup until it is finally allowed to run by one of the users (if you have a fairly large donor database and more than a couple users, then you really should be running the DonorQuest Server Component).

The DonorQuest Local Backup maintains several backup folders in your \DQuest\ installation folder. The weekly backup alternates between the \DQuest\Backup\ and \DQuest\Backup2\ folders. Each time it is run, it will erase the older of these two backups and put the new backup there. DonorQuest also maintains Quarterly backups in the folders \DQuest\BackupQ1\, \DQuest\BackupQ2\, \DQuest\BackupQ3\, and \DQuest\BackupQ4\. These folders are recycled on an annual basis. When it is time for a quarterly backup, it is run along with the weekly backup process.

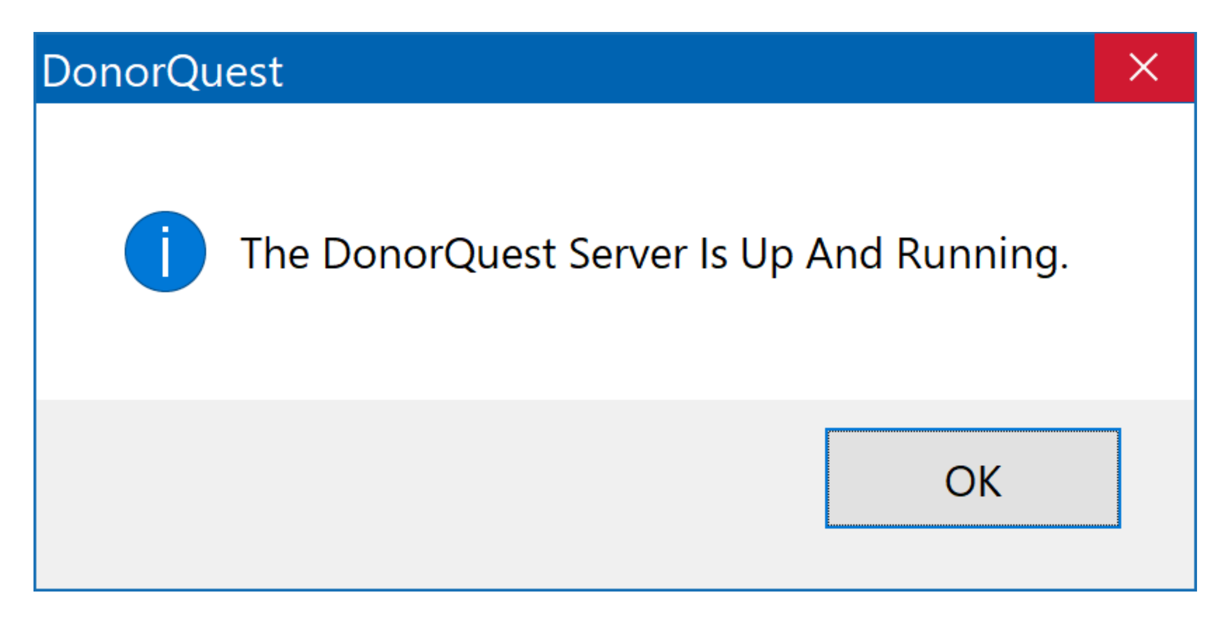
Note that the DonorQuest local backup feature does not protect you against data loss if your file server were to fail (or your local computer if the DonorQuest database is installed on the hard drive in your machine). So it is not meant to take the place of regular server backups which should be done by your IT department. If you are running a non-networked single-user version of DonorQuest on the local hard drive of your computer, then it is your responsibility to make a copy of the \DQuest\ installation folder on a flash memory drive or CD on a regular basis. DonorQuest and all your data are fully self-contained within the \DQuest\ installation folder, so backing up that entire folder is everything you would need to restore in the event of a total system failure. Users of the online version of DonorQuest do not have to worry about nightly backups, as they are done for you as part of the DonorQuest service.

17.16 DonorQuest Server Status

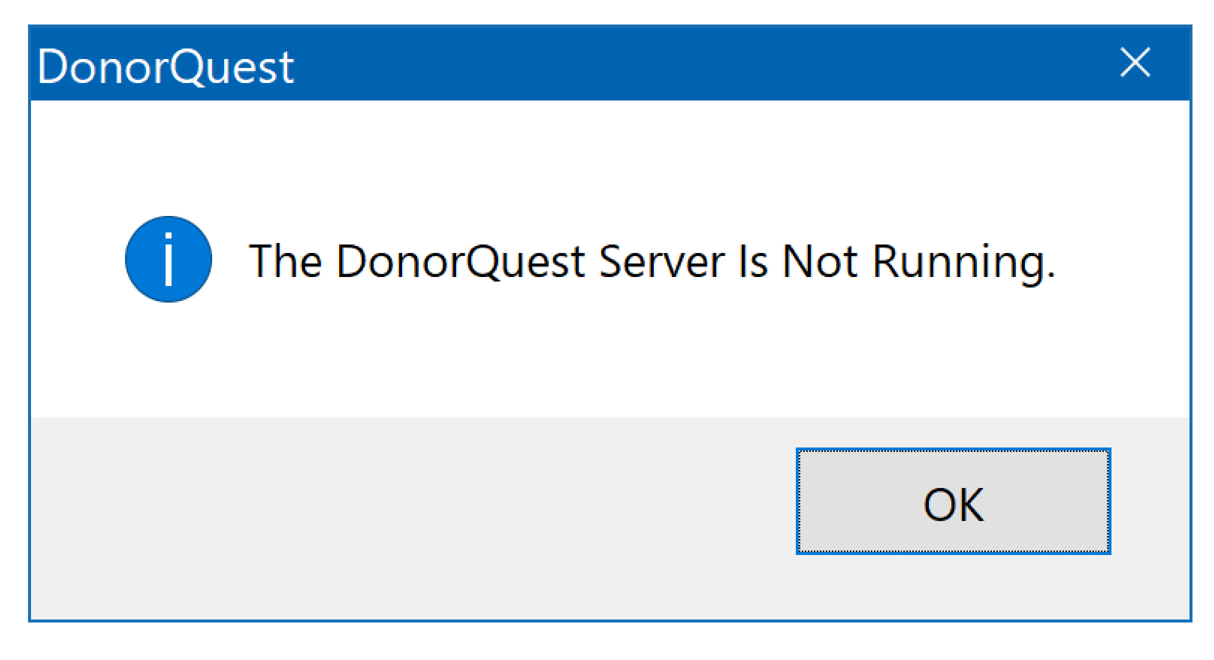
System, DonorQuest Server Status

This feature only applies to the in-house version of DonorQuest, using an in-house server. The cloud servers supporting the online version of DonorQuest are always up and running.

Clicking on System, DonorQuest Server Status will display a simple dialog indicating whether or not the DonorQuest Server Component is up and running on your file server. If it is, you will see:



If you are running DonorQuest as a single-user just on the local hard drive of your machine or using the online version of DonorQuest, then this does not apply to you, and there is no need to have the Server Component running. However, if you are running DonorQuest on a network and sharing the database with other users in your organization with a large database, then you should be running the DonorQuest Server component if you are not. Doing so will greatly speed all data intensive operations such as selections, and it will automate all maintenance features such as the automatic local backup feature. If you are running DonorQuest across a network and you see this message:



...Then you should speak with your IT support department about enabling the DonorQuest Server Component.

17.17 Shutting Down The Server Component

System, Shutdown DonorQuest Server Component

This feature only applies to the in-house version of DonorQuest, using an in-house server. The cloud servers supporting the online version of DonorQuest are always up and running.

If your organization is running the DonorQuest Server Component and you are about to perform a DonorQuest upgrade, then you should first shutdown the Server Component by clicking on System, Shutdown DonorQuest Server. Be sure and reactivate the DonorQuest Server Component after the upgrade is complete. This must be done directly on your file server.

17.18 Index Files

System, Index...

This feature only applies to the in-house version of DonorQuest. The online version of DonorQuest is immune to any possible indexing issues.

Index files in DonorQuest are "pointers" to data. Sometimes the index files may go out of synch with the data tables. This can happen if your network experiences any sort of instability, or if the connection between any one workstation running DonorQuest and the file server is interrupted while DonorQuest is open. DonorQuest is constantly checking the integrity of the index files, so it will notify you if it finds any problems. If it does you should run System, Index, All Tables. You must be the only user in DonorQuest to run this operation, so first ask other users to exit DonorQuest.

Note that if you are running DonorQuest on a network, you should enable the client/server mode of operation by activating the DonorQuest Server Component. This will move all data-intensive operations to the file server where they can be most efficiently and securely implemented. If you are not running the DonorQuest Server component, and you are using DonorQuest on a network, you are forcing DonorQuest to move a lot of information across the network connection between your workstation and the file server. Doing so will stress your network, slow DonorQuest performance, and make it more likely that any instabilities in your network will surface to cause problems.

The System, Index menu in DonorQuest offers other options for building only some index files. If you have a very large database, and the problem prompting an index rebuild can be localized to specific index files, then rebuilding only those will save time. In general it is best to simply use the All Tables option.

This feature does not apply to the online version of DonorQuest.

17.19 Purge Buffer Tables

System, Purge, Buffer Tables

The Buffer dataset may be used for temporary copies of donor accounts or as an intermediate step in the donor data import process. While working in the Buffer dataset, you are free to make changes to the records without affecting the master copy of a donor record housed in the Donor dataset. The Buffer dataset can be routinely purged, so never place any record in it which you wish to keep.

This option is used when you wish to use the Buffer dataset for a special report, export/ import and you wish to first purge it of all data. For example, if you had planned to "hand pick" particular donors for reporting by copying them one at a time to the Buffer dataset, then you would probably want to first purge the Buffer dataset so that only those records you copy will be in the Buffer dataset when you print it. You can use the Copy button in the Main Information Window module to do the actual copying. This feature also makes it easy to practice an import using the buffer dataset as a test before you import it into your Donor dataset, and then easily Purge the Buffer Tables when you are finished.

17.20 Purge Posting File

System, Purge, Posting File

When running in immediate posting mode, the Posting File is normally purged after routine running of the General Ledger Process. However, if you wish to purge the Posting File without first running the General Ledger report, then you may do so using the System, Purge The Posting File option. When running in deferred posting mode, the posting file is automatically purged after a successful donation posting batch runs.

17.21 Purge Report Cache

System, Purge, Local Report Cache

This feature only applies to the in-house version of DonorQuest, using an in-house server. The online version of DonorQuest has no need of report caching.

When DonorQuest is running across a Local Area Network, some large reports may take longer than normal to run, because the data for each report must be transferred to your workstation before the report output can be displayed or printed. To avoid report delays, DonorQuest compensates for the slow performance of a Local Area Network by keeping a copy of the data needed by most reports on your workstation. That way, the reports will have fast access to the data they need. As changes are made to the DonorQuest database, they are also sent to the data caches maintained on each workstation. On rare occasions, the cached report data on your workstation can go out of synch with the master data on your file server. One potential cause of this would be if your computer

were to be suddenly shut down while the cache was updating. To bring your local report cache back in synch with the master files on your server, use the local report cache purge option. This will empty your report cache, and cause DonorQuest to automatically rebuild your local report cache the next time you run a report. If your organization has a large donorbase, then you may need to allow a few minutes for the report cache to rebuild. But once it completes, you will again have super fast reporting.

This feature does not apply to the online version of DonorQuest.

17.22 Purge Server Queue

System, Purge, Server Queue

This feature only applies to the in-house version of DonorQuest, using an in-house server. The online version of DonorQuest does not use a server queue.

If you have configured DonorQuest to run in client/server mode, then DonorQuest will issue commands across your Local Area Network connection to the file server to perform the "heavy lifting" parts of database access. For example, when you run a Selection, the selection filters you specify are sent to the main file server for processing. This is much faster than if your workstation were to move data across your network connection to pass it all through your selection filter. Since multiple workstations can be using DonorQuest at the same time, all sending requests to the server, the server stores requests it hasn't gotten to yet in a Queue. Normally the queue empties out as requests are processed. But it is possible for queue to get "stuck" on a particular request which the server is having difficulty processing. When this happens, you should purge the server queue to clear it out.

This feature does not apply to the online version of DonorQuest.

17.23 Packing Tables

System, Pack...

There are four options on the System, Pack menu. The first three will pack all the tables of each of the three datasets. The fourth is for packing the System tables which DonorQuest uses to store non-donor information, such as report layouts, user-specific preferences, etc.

Packing is the act of physically removing deleted records from a database file. When you delete information in DonorQuest (specific donations, pledges, or entire donor accounts with all associated donations, etc.), DonorQuest will simply mark the records as deleted. All records marked as deleted are ignored by DonorQuest, so it's as if they aren't there, but physically they are still taking up space in their respective table. The reason DonorQuest uses this "marking" technique is to make deletions quick and easy. If DonorQuest were to physically remove the record you want to delete from the database, it

would take too much time to "shuffle" the surrounding records in the database to reclaim the space. This practice also makes possible the restoration of accidentally deleted donor records using the Donor, Restore A Deleted Donor feature. It's all a bit like the Recycle bin in Windows which holds deleted files until it is emptied.

But there comes a time when you've "marked" so many donor records as deleted that you're beginning to waste quite a bit of space storing these records which aren't supposed to exist anymore. How quickly this happens depends on how often you delete donors, but users can typically go for a year or more before worrying about it. The Packing options will do the necessary data "shuffling" to reclaim the space used by records marked as deleted. This is like emptying the Recycle bin in Windows. To see the percent of records of each DonorQuest table which have been marked as deleted, click on Reports, Database Status. Generally when about a third of the records in a table have been marked as deleted, it's time to do a pack.

Warning: You MUST back up all of your donor data immediately prior to doing a PACK on the Donor or Archive datasets. This will ensure that you are able to recover from a power failure or other system problem if one should occur during the pack. When DonorQuest is Packing a dataset, it must NOT be disturbed for any reason. If there is a power failure, or the computer is shut off or rebooted, the dataset being packed will be damage, and must be restored from backup. You must also be the only user logged into DonorQuest to initiate a pack. Once you pack the Donor dataset, you will not be able to restore any mistakenly deleted donor records which were deleted prior to the pack.

17.24 Table Integrity

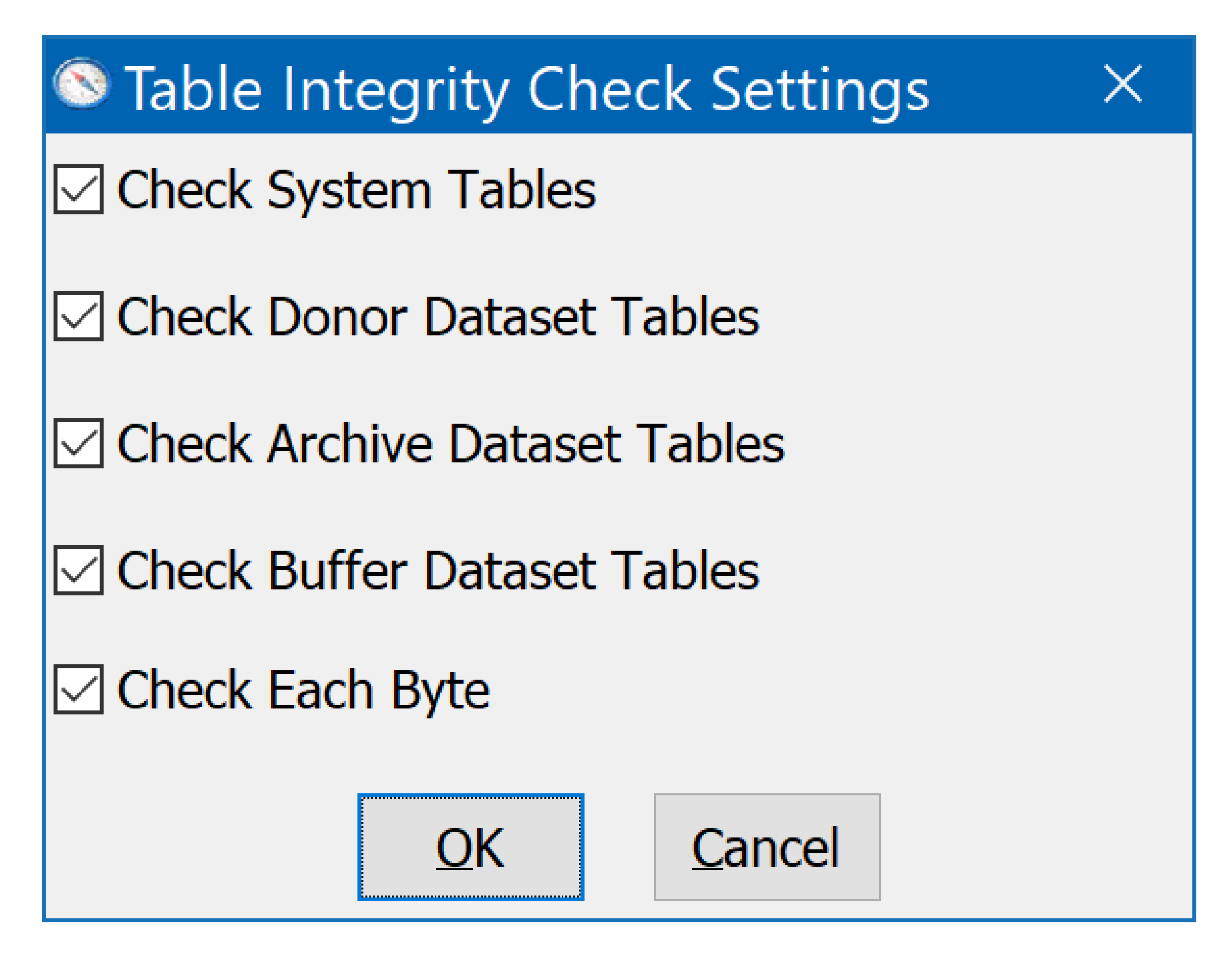
System, Table Integrity...

This feature does not apply to the online version of DonorQuest.

With the client/server technology offered in DonorQuest 7 and later, the Table Integrity features are really more about checking to be sure your database is up to specification for the current version of DonorQuest you are running. It is actually used as part of the standard DonorQuest upgrade process, and it is capable of adding new data fields and widening existing fields as needed. All of the table integrity procedures are offered on the DonorQuest System, Table Integrity menu:

Check Only

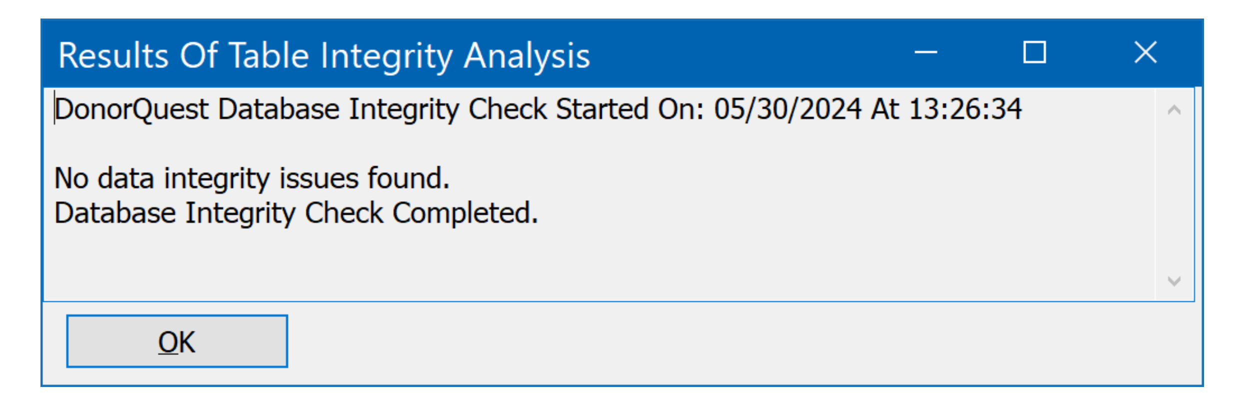
This table integrity option will simply check that all your data tables are up to date and free of any problems. When you click on System, Table Integrity, Check Only, you will be shown the following dialog:



In most cases you should accept the default settings. This will thoroughly check all tables. The first four options allow you to control which table groups are checked, and the last option, Check Each Byte, control how thorough DonorQuest is in checking for problems. Leaving the Check Each Byte option off will just run a quick structural check of all the selected tables, reporting any which are not up to specification because they are missing fields, or having existing fields which are either no longer needed, or have an incorrect data length. If you have restored a DonorQuest database that was installed and maintained with an older release of the software, then there will likely be tables which need to be upgraded via the Full Update Mode table integrity option (explained below). This option is simply used for detecting problems, not correcting them.

The Check Each Byte option examines the actual data in each table, looking for suspect data that may have been the result of a network glitch or data write which occurred during a power failure. This check will also detect any non-standard character data which could not normally be entered from the keyboard, and which is therefore suspect. Typically, such data is simply the result of copying and pasting text from website of other sources which have embedded hidden characters. Data like this is harmless, but should be edited out of the database when found. If DonorQuest detects any such data, it will tell you the Donor ID and field(s) involved so that you can lookup the donor account and edit the text of the affected field(s). In general you should always keep the Check Each Byte option turned on, unless you are in a hurry and just want to run a quick compatibility check between the version of DonorQuest you are running and the database.

After the check runs, if all is well you will see a window simply showing the starting date and time of the check, with no errors showing, which looks like this:



Build Missing

The System, Table Integrity, Build Missing option is a step in the corrective direction, but it simply creates missing tables. It does not correct the structure of existing tables. It simply build tables that are missing. You will be asked if it is ok to rebuild index files if any tables are added. You should click Yes unless you plan to build them later by selecting System, Index, All Tables. The Check Each Byte checkbox is normally off, but you may turn it on if you want additional diagnostic information about existing tables.

The Build Missing option is mainly intended for a situation in which you are trying to recover from a system crash for which you do not have a backup, and you have some but not all of the required DonorQuest files. This sort of situation should never happen these days -- do your backups!

Update Structures

The System, Table Integrity, Update Structures option is another step further in the corrective direction, and it will build missing tables and update the structure of existing tables to be compatible with the release of DonorQuest you are running. You will be asked if it is ok to rebuild index files if any tables are added. You should click Yes unless you plan to build them later by selecting System, Index, All Tables. The Check Each Byte checkbox is normally off, but you may turn it on if you want additional diagnostic information about existing tables.

Full Update Mode

The System, Table Integrity, Full Update Mode option does all of the above. It is what is run automatically when you perform a DonorQuest upgrade. The upgrade process launches DonorQuest in this mode as part of the upgrade. If you were to manually apply a newer DonorQuest program file (DQWin.exe) to a folder containing an older DonorQuest installation, you would need to run this process for the database to be made compatible.

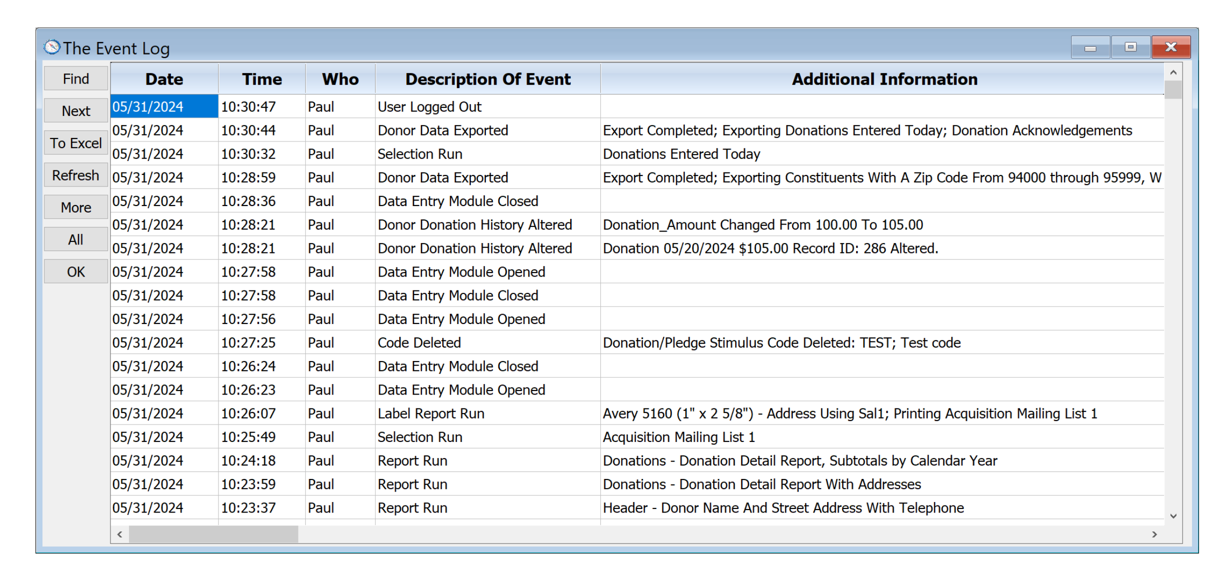
Also, if you were to restore any files from a backup you have that were last updated with an older copy of DonorQuest, you would need to run this process to be sure the restored files are made compatible.

You will be asked if it is ok to rebuild index files if any tables are added or modified. You should click Yes unless you plan to build them later by selecting System, Index, All Tables. The Check Each Byte checkbox is normally off, but you may turn it on if you want additional diagnostic information about existing tables.

17.25 The Event Log

File, Open, The Event Log

DonorQuest stores detailed tracking information for the activities of all users. Everything from when each user logged in, to when they logged out is chronicled. This can be very helpful if, for example, a user accidentally deletes a donor, but then can't remember who it was they deleted. They can lookup that information in the DonorQuest Event Log, then use the Restore A Deleted Donor feature to retrieve the donor account. To open the event log, simply click on File, Open, The Event Log. You will then see a display similar to this:



Date	Time	Who	Description Of Event	Additional Information
05/31/2024	10:30:47	Paul	User Logged Out	
05/31/2024	10:30:44	Paul	Donor Data Exported	Export Completed; Exporting Donations Entered Today; Donation Acknowledgements
05/31/2024	10:30:32	Paul	Selection Run	Donations Entered Today
05/31/2024	10:28:59	Paul	Donor Data Exported	Export Completed; Exporting Constituents With A Zip Code From 94000 through 95999, W
05/31/2024	10:28:36	Paul	Data Entry Module Closed	
05/31/2024	10:28:21	Paul	Donor Donation History Altered	Donation_Amount Changed From 100.00 To 105.00
05/31/2024	10:28:21	Paul	Donor Donation History Altered	Donation 05/20/2024 $105.00 Record ID: 286 Altered.
05/31/2024	10:27:58	Paul	Data Entry Module Opened	
05/31/2024	10:27:58	Paul	Data Entry Module Closed	
05/31/2024	10:27:56	Paul	Data Entry Module Opened	
05/31/2024	10:27:25	Paul	Code Deleted	Donation/Pledge Stimulus Code Deleted: TEST; Test code
05/31/2024	10:26:24	Paul	Data Entry Module Closed	
05/31/2024	10:26:23	Paul	Data Entry Module Opened	
05/31/2024	10:26:07	Paul	Label Report Run	Avery 5160 (1" x 2 5/8") - Address Using Sal1; Printing Acquisition Mailing List 1
05/31/2024	10:25:49	Paul	Selection Run	Acquisition Mailing List 1
05/31/2024	10:24:18	Paul	Report Run	Donations - Donation Detail Report, Subtotals by Calendar Year
05/31/2024	10:23:59	Paul	Report Run	Donations - Donation Detail Report With Addresses
05/31/2024	10:23:37	Paul	Report Run	Header - Donor Name And Street Address With Telephone

Each column of the event log window may be ordered by single-clicking on the title for the column. Clicking a second time will reverse the sort order for the current column.

Events Tracked In The Event Log

The following events are tracked in the DonorQuest event log:

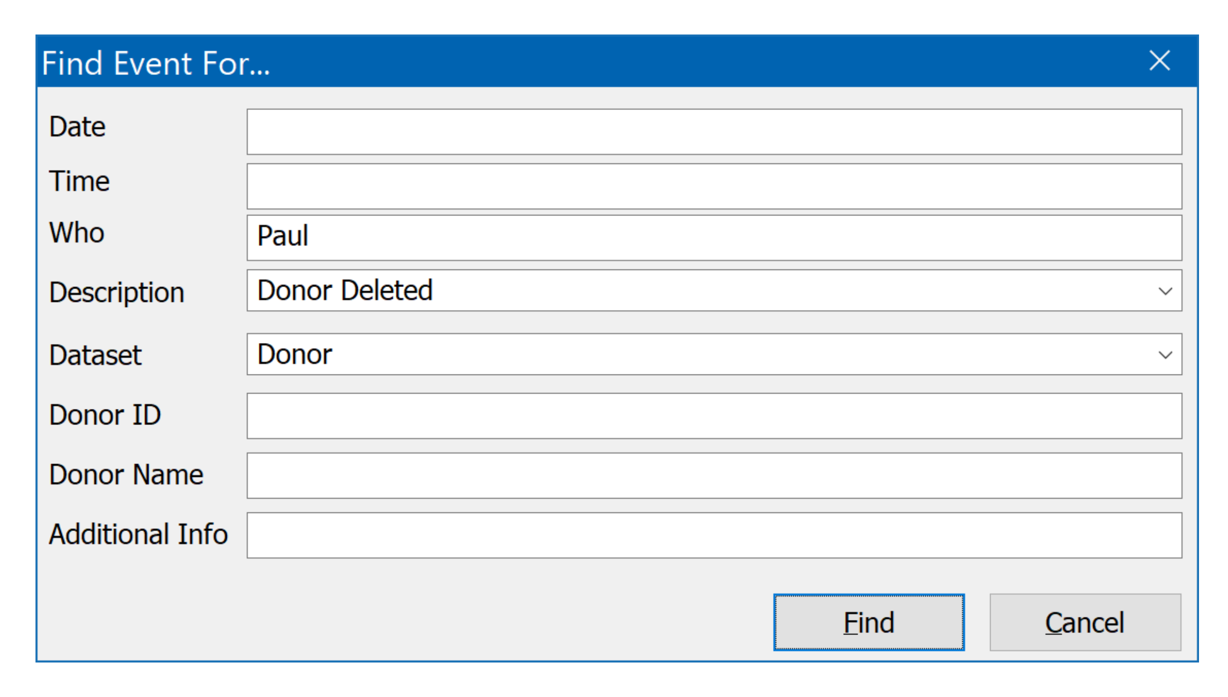
Abnormal Program Termination Detected
Account Consolidation Performed
Archive Donors Deleted From Donor Dataset
Backup Performed

Code Deleted
Code Tables Expanded From Dataset
Custom Selection Definition Edited
Dashboard Activity
Data Entry Find Failed
Data Entry Find Succeeded
Data Entry Module Closed
Data Entry Module Opened
Data Entry Timeout Occurred
Data For A Specific Donor Restored
Data Import Begun
Data Import Ended
Data Import Field Referenced
Data Restored Via A Selection Result
Donation Added
Donation Default Field Values Altered
Donation Posting Completed
Donation Posting Started
Donor Data Exported
Donor Dataset Files Packed
Donor Dataset Index Files Rebuilt
Donor Default Field Values Altered
Donor Deleted
Donor Donation History Altered
Donor Extra Address History Altered
Donor History Copied To Archive
Donor Linkage History Altered
Donor Memo History Altered
Donor Metrics Activity
Donor Name/Address History Altered
Donor Pledge History Altered
Donor Scheduled Contacts History Altered
Duplicate Donor ID Avoided Via Link Semaphore Check
Duplicate Link ID Check Found Duplicate(s)
Duplicate Link ID Check Found No Duplicate
EMail Initiated
Extra Address Added
General Error Condition
General Ledger / Mail Merge Run
Graphing Activity
Information Deleted Via A Selection Result
Label Report Format Created
Label Report Format Deleted
Label Report Format Edited
Label Report Run
Linkage Added
Mass Record Addition Performed
Memo Added
Miscellaneous
New Donor Created

Orphan Donation Check Found No Orphans
Orphan Donation Check Found Orphan(s)
Pledge Added
Posting File Purge
Program Or Environment Error Occurred
Report Cache Purged
Report Format Created
Report Format Deleted
Report Format Edited
Report Run
Scheduled Contact Added
Selection Auto-Saved After Record Removal Or Reordering
Selection Exported
Selection Ordered
Selection Printed
Selection Result Appended To A Dataset
Selection Result Converted To Header
Selection Result Deleted
Selection Result Record Removed
Selection Result Refreshed
Selection Result Sweeping List Addition Performed
Selection Result Sweeping List Replacement Performed
Selection Result Sweeping Replacement Performed
Selection Run
Selection Viewed
Stored File Accessed In Place
Stored File Added
Stored File Deleted
Stored File Retrieved
System Data Files Packed
System Index Files Rebuilt
Table Encryption Status Changed
Totals Recomputed
Undefined
User Account Added
User Account Deleted
User Account Settings Edited
User Account Setup Area Accessed
User Changed Their Password
User Edited Their Personal Settings
User Logged In
User Logged Out
Warning: Zero Link ID Detected
Zero Link ID Check Found No Zero ID(s)
Zero Link ID Detected
Zero Link ID Integrity Check Run
Zip Table Expanded

The Find Button

The Find button allows you to search the event log by any combination of column values. For example, to search for all donors deleted by use Paul from the Donor dataset, you would use the following search values:



This will easily allow you to see all of the donors deleted by user Paul in the event one was deleted by accident. You could even specify the Donor Name in the search if you know it, but generally using the above search values would be sufficient since the most recently deleted donors would show first, and this avoids the possibility of a misspelled name causing the search to fail.

The Next Button

The Next button will continue the previous search for the next event log entry which matches your search values. Unlike the main Find in the Main Information windows you use for data entry in DonorQuest, the Find here does not hide records which do not match your search. Rather, the search is used to skip ahead from matching record to matching record, without any hiding of events. This allows you to see (following the above example) all of the intervening events between donor deletion events.

The To Excel Button

The To Excel button will simply open Excel and copy the most recent 30,000 events to a new Excel spreadsheet. The online version of DonorQuest will copy event history to a new Calc spreadsheet, which may be optionally saved to an Excel spreadsheet on your computer or network drive.

The Refresh Button

The To Refresh button will update the display with any new events.

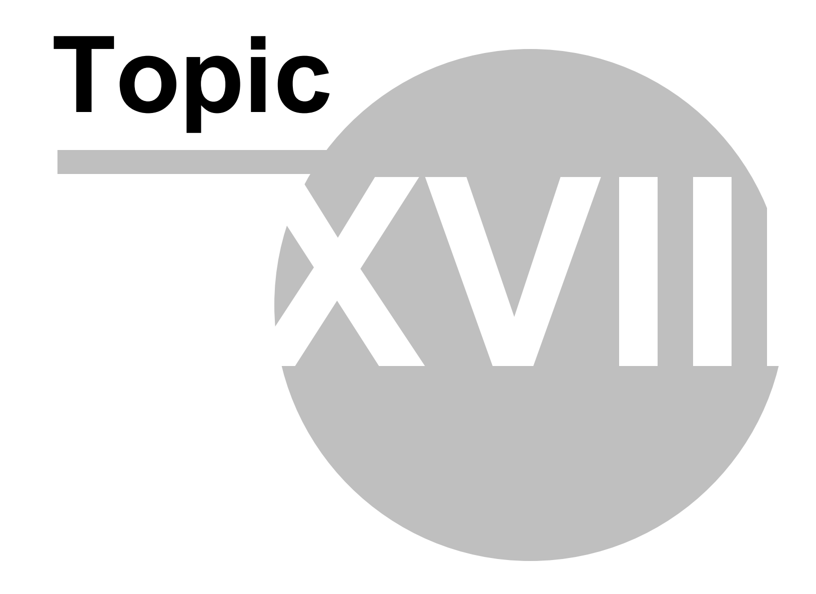
The More Button

The More button will load the next 30,000 events (going back in time) into the viewer.

The All Button

The All button will load all known events. DonorQuest will track up to 100,000 events.

Topic



18 What Was New In Previous Releases

This topic serves as an archive of what was new in each significant DonorQuest release, starting with version 7.0.

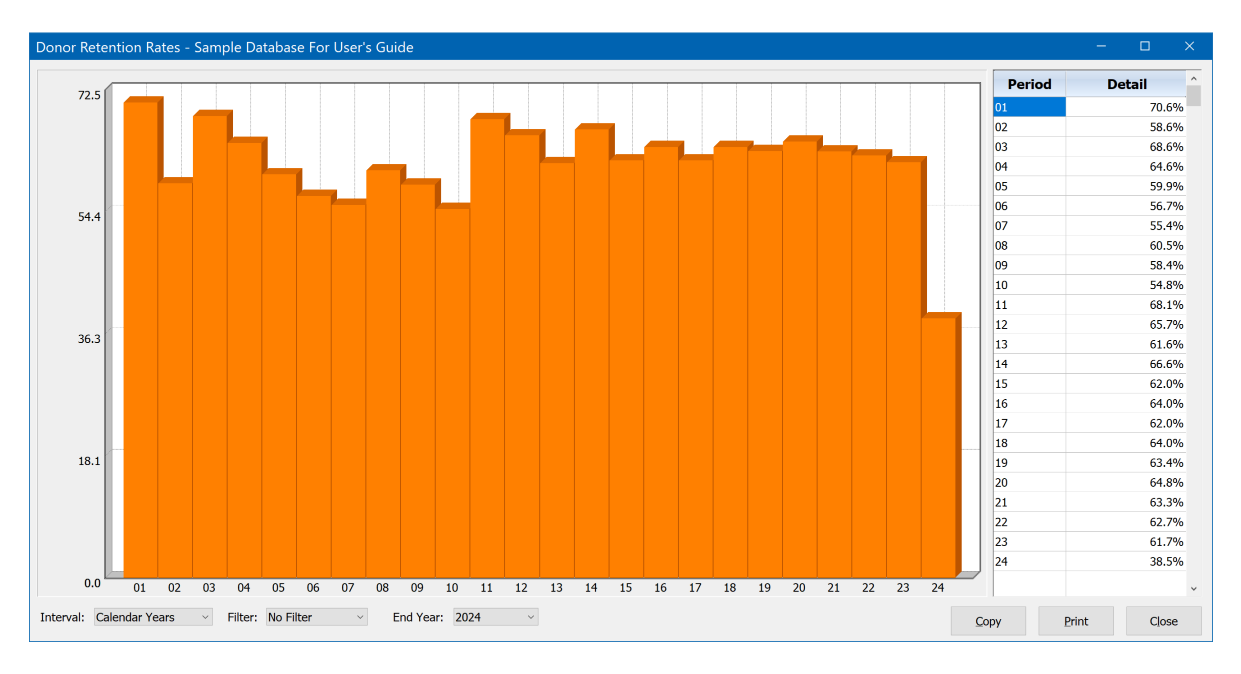
18.1 What Was New In DonorQuest 7.8

DonorQuest 7.7 was a huge release with a lot of new statistical analysis and graphing features. While DonorQuest 7.8 adds a few new features, it mainly focuses on performance optimizations on the processing-intensive features introduced in 7.7, as well as some user interface enhancements to them. If you are upgrading from a version of DonorQuest earlier than 7.7 (the previous release), you should also consult the various "What's New..." documents, available under the, "What Was New In Previous Releases" topic of this User's Guide. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

Here's an overview of the new features in DonorQuest 7.8:

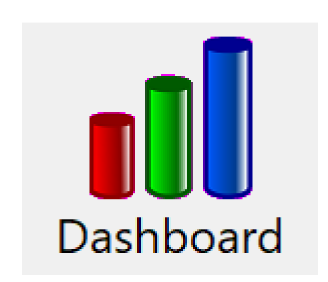
Donor Retention Graphs

DonorQuest 7.8 now allows you to assess your donor retention rates through an exciting new series of graphs which show retention from year-to-year (fiscal or calendar), or from quarter to quarter between years, or for a specific month between years. There is also an option for viewing monthly donor retention rates. This new graph can be accessed by clicking on Reports, Graphs, Donor Retention Graphs. Here's an example of the year-to-year Donor Retention Rates graph:



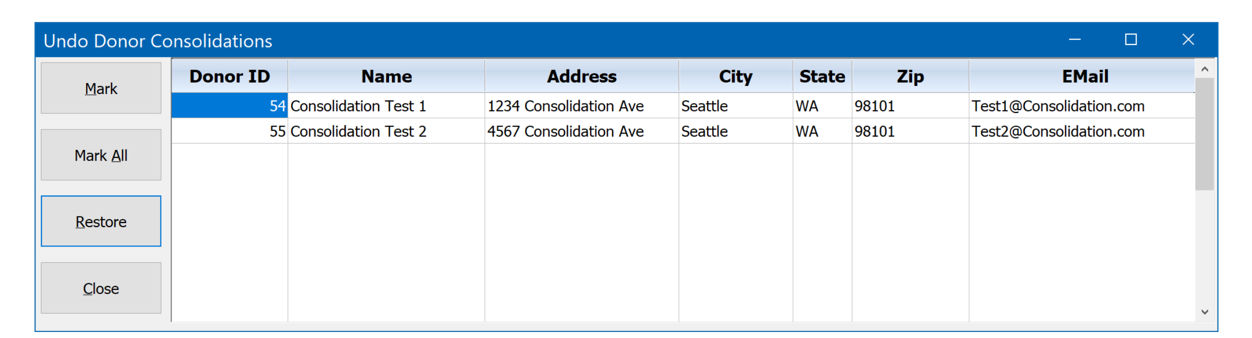
The Dashboard Has Been Set Free!

DonorQuest 7.7 introduced an amazing dashboard for tracking donor statistics, fresh data coming in, and the donor-specific activity of other users in realtime. It was designed to stay open continuously so you could monitor incoming information as it happened. But it was confined to the main DonorQuest program window, so it wound up taking valuable screen space away from other windows that were open at the same time. Now the Dashboard display may be moved outside the main DonorQuest program window, including to other screens you may have! The Dashboard display is so information-rich that it really deserves its own display anyway. Now you can monitor realtime activity in DonorQuest on a side screen while going about your normal daily activity in the main DonorQuest program window. The Dashboard window will now also stay open even as you are busy moving between data entry, running selections, and printing reports. As a reminder, the DonorQuest dashboard can be opened at anytime by clicking on this icon:



Ability to Undo Donor Consolidations

DonorQuest has long allowed you to combine multiple existing donor accounts for any reason - usually because they are duplicate accounts. When a consolidation is done, all donations, pledges, etc. are moved from the duplicate account(s) to the single account you want to keep. However, until now, the process could not be reversed if done by mistake. In DonorQuest 7.8, you may now recover from accidentally having consolidated away account you want to get back in it's pre-consolidated state. To do this, open the Main Information window, and highlight the donor account which was the destination for the account consolidation(s) you wish to reverse. Then click on Donor, Undo Consolidations To Donor. If there are any donor accounts which were consolidated to the current account and not yet restored, the will be displayed in a window like this:



Clicking the Restore button will restore just the currently highlighted account. However, you may use the Mark or Mark All buttons to mark multiple consolidated accounts for restoration. Clicking the Restore button will then restore all marked accounts.

Mass Address Archive

DonorQuest 7.8 allows you to make an archival copy of the main address information for all the donors in a Selection Result. The main addresses are copied to newly allocated Extra Address records, just as you can do on a case-by-case basis using the Archive Address button of the Main Information Form window. This may be desirable if you are about to perform a mass data operation which will likely change the main address information for a group of donors, and you want to still keep the current address information as part of each donor's record. For example, when applying address change information from a National Change of Address run. Since all Extra Address records for each donor are included in the Flex-Find search used when manually entering donations, the donor would still be found using their old address information, even though their main address has been updated.

Improved Handling Of Undefined Codes In Data Entry

Previously, when tabbing through a form which contains undefined code values (usually very old data for which the drop-down code definitions have been removed), DonorQuest would not allow tabbing out of a field containing an undefined code. Your only option was to define the code anew. This was inconvenient because you may simply wish to tab through a form which may contain invalid codes. In DonorQuest 7.8 now you may freely tab through a form with invalid codes, but you will not be allowed to save changes to the form unless all code values pass validation. Note that if you desire no code validation at all, you may turn off the feature under Configure, Program Settings.

Updated Zip Code Table

DonorQuest 7.8 includes an update to the internal city/state/zip/county table which is used to auto-populate city, state, and county for you when you enter zip code and press the Tab key.

New Standard Reports Added

DonorQuest 7.8 includes the following new standard reports:

Contacts - Grant Payment Report - Approved Grants Not Yet Paid Off
Contacts - Tickler Report By User
Contacts - Tickler Report By User, Open Contacts Only

Donations - Average Donation
Donations - Count And Total Of Donations By 5-digit Zip With Percentages
Donations - Dollar Totals Of Gifts By Month And Calendar Year
Donations - Dollar Totals Of Gifts By Month And Stimulus
Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Current Cal Year's Total
Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Prev Cal Year's Total Giving
Donations - Donor Report (Ranked) w/ Contact Info & Donation Totals
Donations - Grouped By Account, Ordered By Constituent Name Within Account
Donations - Grouped By Account, Subtotalled by Stimulus
Donations - Grouped By Donor And Fund - Summary
Donations - Grouped By Donor Name With Address, Donation Totals, Counts, And Averages
Donations - Grouped By Donor Name With Donation Totals, Counts, And Averages
Donations - Grouped By Organization Name And Account
Donations - Grouped By Stimulus With Monthly Totals In Columns
Donations - Grouped By Stimulus, Subgrouped By Donor Name
Donations - Grouped By Stimulus, Subsorted By Amount
Donations - Grouped By Stimulus, Subsorted By Donor Name
Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Subsorted By Giver
Donations - Totals And Year Counts
Donations - Totals And Year Counts, With Address, First, And Most Recent Years
Donations - Year By Month Summary Report -10 Years
Extra Address - Basic Fields
Extra Address - Basic Fields, Grouped By Extra Address Code
Extra Address - Basic Fields, Grouped By Zip Code
Extra Address - Zip Code Counts
Header - Comparison Of Year-To-Date Giving By Fiscal Year
Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease With Detail
Header - Current And Previous Calendar Year Donations, Sorted By Increase/Decrease, With Counts
Header - Current And Previous Calendar Year Donations, Sorted By Zip With Detail
Header - Current And Previous Fiscal Year Donations, Sorted By Increase/Decrease With Detail
Header - Current And Previous Fiscal Year Donations, Sorted By Increase/Decrease, With Counts
Header - Current And Previous Fiscal Year Donations, Sorted By Zip With Detail
Header - Donation Receipts, Previous Year Donations Only With Logo
Header - LYBUNT Report
Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease With Detail
Header - Last Two Calendar Years Of Donations, Sorted By Increase/Decrease, With Counts
Header - Last Two Calendar Years Of Donations, Sorted By Zip With Detail
Header - Pledge History Report With Payment Schedule, All Pledges
Pledge Statements: For Scheduled Payment Pledges
Pledge Statements: For Scheduled Payment Pledges, With Payment History
Pledges - Average Pledge
Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year, Scheduled
Pledges - Cash Flow Forecast From Pledges For Current Fiscal Year, Scheduled (Summary)
Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year, Scheduled
Pledges - Cash Flow Forecast From Pledges For Next Fiscal Year, Scheduled (Summary)
Pledges - Cash Flow Forecast From Pledges For Next Year, Scheduled
Pledges - Cash Flow Forecast From Pledges For Next Year, Scheduled (Summary)
Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now, Scheduled
Pledges - Cash Flow Forecast From Pledges For The Year, 2 Years From Now, Scheduled (Summary)
Pledges - Cash Flow Forecast From Pledges For The Year, 3 Years From Now, Scheduled

Pledges - Cash Flow Forecast From Pledges For The Year, 3 Years From Now, Scheduled (Summary)
Pledges - Cash Flow Forecast From Pledges For The Year, 4 Years From Now, Scheduled
Pledges - Cash Flow Forecast From Pledges For The Year, 4 Years From Now, Scheduled (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Current Year Jan-Jun, Scheduled
Pledges - Cash Flow Projected/Actual From Pledges Current Year Jan-Jun, Scheduled (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December, Scheduled
Pledges - Cash Flow Projected/Actual From Pledges Current Year July-December, Scheduled (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun, Scheduled
Pledges - Cash Flow Projected/Actual From Pledges Last Year Jan-Jun, Scheduled (Summary)
Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December, Scheduled
Pledges - Cash Flow Projected/Actual From Pledges Last Year July-December, Scheduled (Summary)
Pledges - Grouped By Year of Start Date
Pledges - Grouped By Year of Start Date - Summary
Pledges - Grouped By Year of Start Date And Pledge Stimulus
Pledges - Grouped By Year of Start Date And Pledge Stimulus - Summary
Pledges - Grouped By Year of Start Date And Pledge Stimulus With Payments - Summary
Pledges - Pledge Detail Report With Payment Schedule
Pledges - Pledge Receivables As They Were On A Specific Date, Excluding Zero Balance Pledges

December, 2020

18.2 What Was New In DonorQuest 7.7

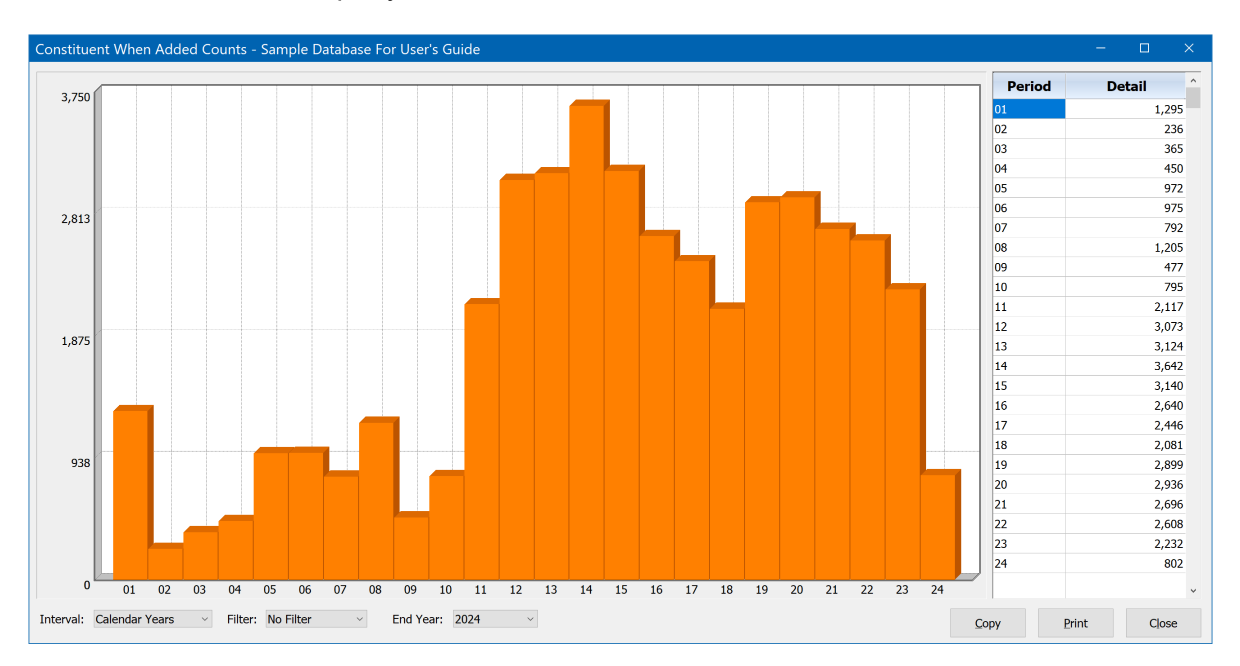
DonorQuest 7.7 includes quite a few exciting enhancements as outlined below. If you are upgrading from a version of DonorQuest earlier than 7.6 (the previous release), you should also consult the various "What's New..." documents, available under the, "What Was New In Previous Releases" topic of this User's Guide. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

Here's an overview of the new features in DonorQuest 7.7:

New Graphing Capabilities

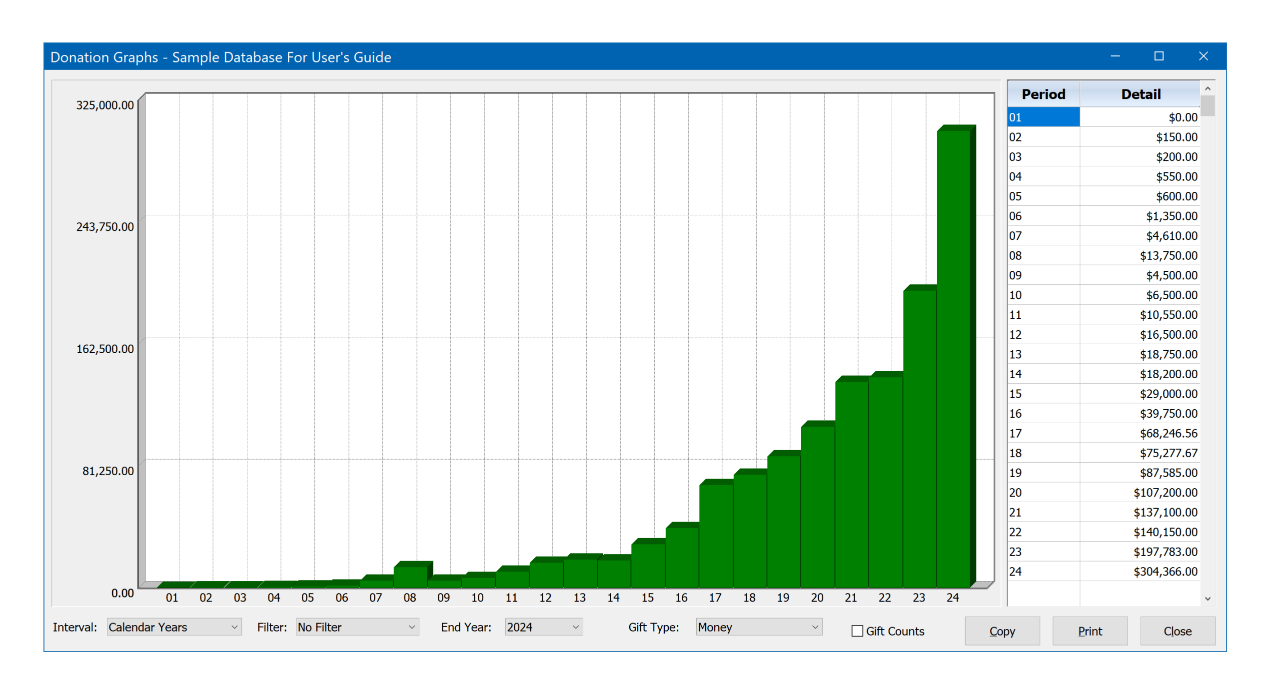
The graphing abilities of DonorQuest have been expanded considerably. Now you can graph counts of new Constituent and Memo additions over time, plus detailed count and dollar information for Donations, Pledges, and Contacts. These graphs are available both on the Reports menu, and when the Selection Results window is open. If you wish the graphs to operate on all Constituents, Memos, Donations, Pledges, and Contacts, then launch them from the Reports menu. However, if you wish to graph only the records of a particular Selection Result, start by opening the Selection Results window, highlight the selection you wish to graph, then click the new Graph button you will see on the left side of the Selection Results window. The graphs are particularly flexible when used with a Selection Result, as this allows you to apply any conceivable filter condition to the data table being graphed. For example, you could graph just the donations for a specific campaign by first running a selection to capture those specific donations.

Counts in graphs are shown in amber, and dollar totals in green. For example, here is what the Constituent Counts graph looks like for a typical nonprofit organization adding a few thousands constituents per year:



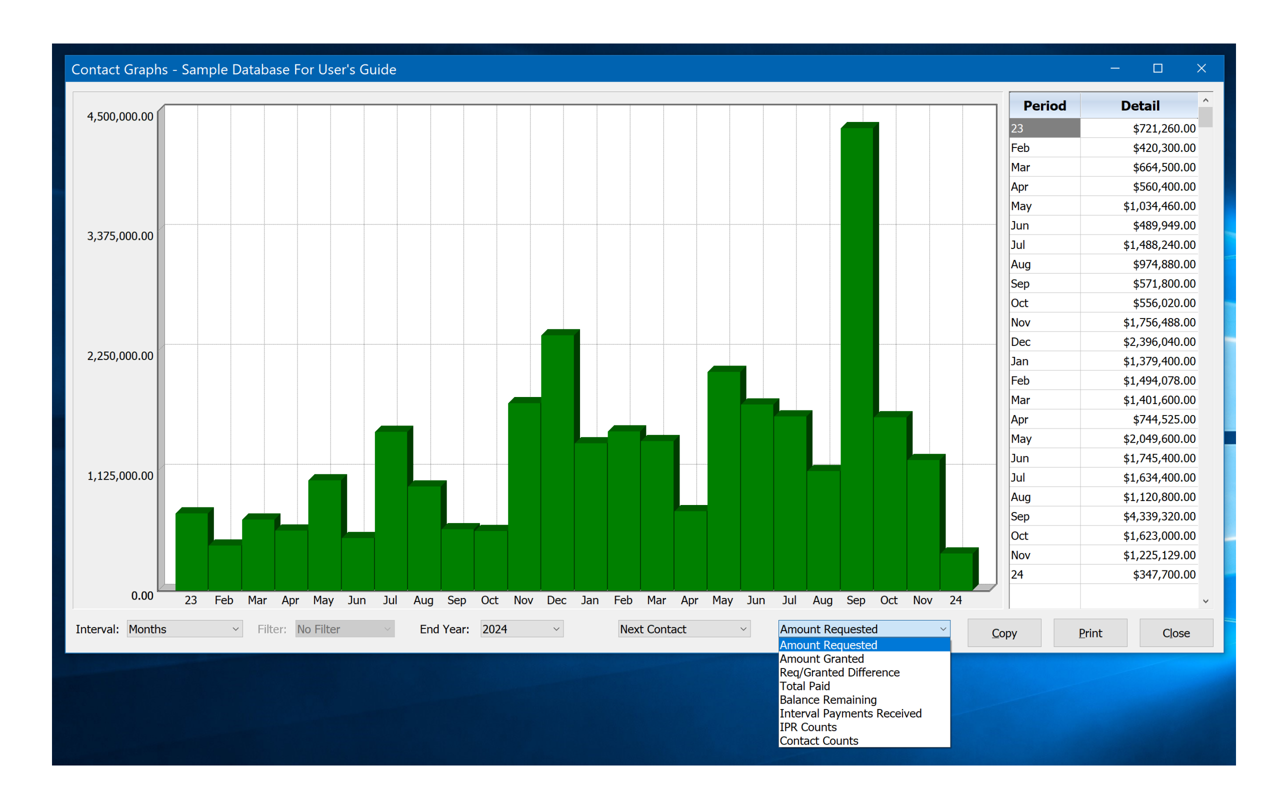
To the right of the graph is a two-column grid showing the exact values from the graph for easy reference. Also notice the drop-down options shown beneath the graph. For the above graph, the Interval option allows you to control the time interval (Calendar Years, Fiscal Years, Months, Weeks, or Days) shown on the horizontal axis of the graph. The Filter option allows you to restrict which constituents are counted for each Interval (you can limit by Year-To-Date, Quarter 1, 2, 3, or 4, or by a specific month within each year). The End Year drop-down simply lets you establish an end point for the horizontal time axis. It defaults to ending at the current year (showing a full 24 years), but moving the endpoint into the past allows you to see any 24-year segment in time. If you choose a small time interval (such as days or weeks), the End Year control will transform to an End Date control, allowing you to choose a specific End Date.

Here is an example of what the new Donation graphs looks like:



As with the Constituent graphs, there is a two-column grid on the right showing the exact values from the graph for easy reference. There are also drop-down options for Interval, Filter, and End Year. But in addition the Donation graph has options for the Gift Type (Money or non-monetary types such as volunteer hours), and a checkbox for seeing gift counts as opposed to totals. In the above example, we have the Filter option set to Year-To-Date, so the yearly totals reflect total donations for the current date (month and day) for each year.

The Contact graphs also share the basic Interval, Filter, and End Year options, but they also have two special options for viewing financial grant-oriented contacts. Here is an example of a contact graph showing dollar totals, by month, of all the grant request amounts made:

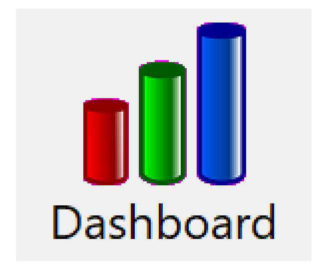


All graphs also include Copy and Print buttons. The Copy button allows you to copy the entire graph to your computer's copy/paste area so that you may paste the graph into Word documents, Excel, EMails, etc. The Print button simply prints the currently displayed graph on your printer. There's a whole lot more to the new graphing capabilities in DonorQuest than is shown in this upgrade overview, so consult the main User's Guide for more details and most importantly feel free to open the graphs under Reports, Graphs, and just experiment!

New Dashboard Display

The new DonorQuest Dashboard offers a live view of what's going on in your donor database from minute to minute. All of the displays within the dashboard are updated in realtime, so you may simply leave it open to continuously monitor the information which most interests you. The dashboard can be kept open along with other DonorQuest windows, allowing you to do your normal activities in DonorQuest while still monitoring events. It can also be resized to suit your preferences and to fit nicely with whatever else you may have open in DonorQuest. Any preference changes you make to the dashboard will be saved under your user account, allowing you to have your own customized dashboard.

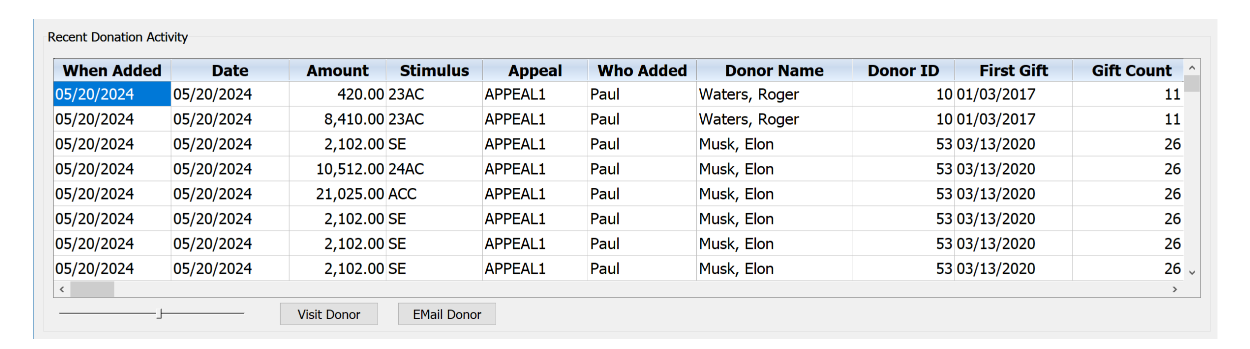
The dashboard display consists of grids and graphs. Some are donor-specific, and others are more statistical in nature, showing realtime totals across many donors. You may open the DonorQuest Dashboard at anytime by clicking the icon for it on the DonorQuest toolbar, which looks like this:



Here is a brief overview of the various displays within the dashboard:

Recent Donation Activity

The Recent Donation Activity display is a running track of donations as they are entered. If you have multiple data entry people at work entering (or importing) donations, you will see them here as they hit the database. Below the grid are some controls - a horizontal slider to control the font size of the grid, and a couple buttons. The Visit Donor button will automatically position you at the donor's record in the main data windows so that you can see full details about any of the donors who just had a donation added. The dashboard window will stay open alongside the main data windows so that they may be used in combination. There is also an Email Donor button which will allow you to compose and send an email right on the spot to a donor if you wish. If you are a campaign manager and you happen to know a donor who just gave a large gift, you could thank them immediately and personally! In total, the Recent Donation Activity grid has the following columns: When Added (actual date donation added), Date (date assigned to donation), Amount, Stimulus, Appeal, Who Added, Donor Name, Donor ID, First Gift, Gift Count (lifetime), Life Total, Address, City, State, Zip, Phone, Primary Email, Donor Type, Fund (for donation), Type, Account, Thank-You Letter, and Comment. Here is what the Recent Donation Activity display looks like:

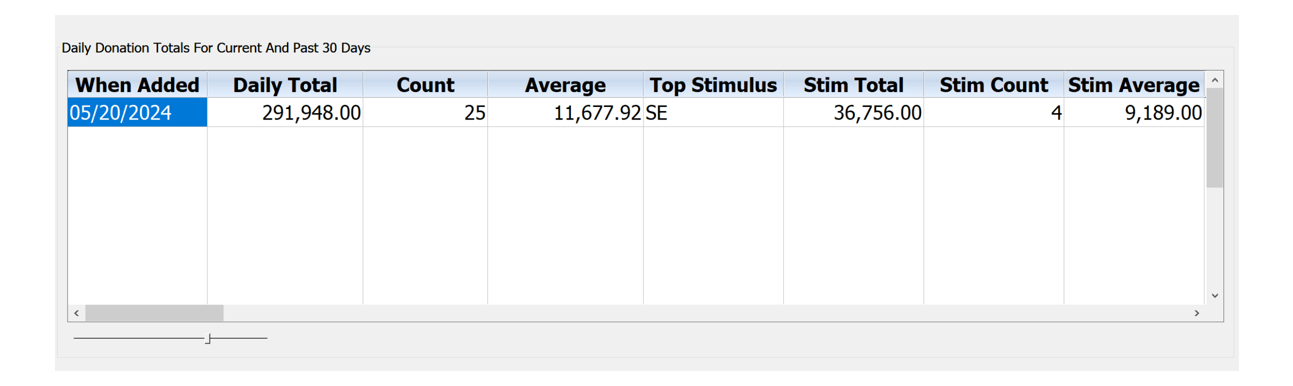

Recent Donation Activity

When Added	Date	Amount	Stimulus	Appeal	Who Added	Donor Name	Donor ID	First Gift	Gift Count
05/20/2024	05/20/2024	420.00	23AC	APPEAL1	Paul	Waters, Roger	10	01/03/2017	11
05/20/2024	05/20/2024	8,410.00	23AC	APPEAL1	Paul	Waters, Roger	10	01/03/2017	11
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	10,512.00	24AC	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	21,025.00	ACC	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26
05/20/2024	05/20/2024	2,102.00	SE	APPEAL1	Paul	Musk, Elon	53	03/13/2020	26

Visit Donor EMail Donor

Daily Donation Totals For Current And Past 30 Days

This dashboard display is intended to give you a summary of daily revenues for the current and past 30 days. It provides a quick way to get a handle on your day-to-day entry volume and revenues. It shows a daily total, gift count, and average by actual entry date (not the given donation date, though they are typically the same). Also shown is the top stimulus for each day by revenue, along with a gift count and average amount for the top stimulus. Here is what the display looks like:

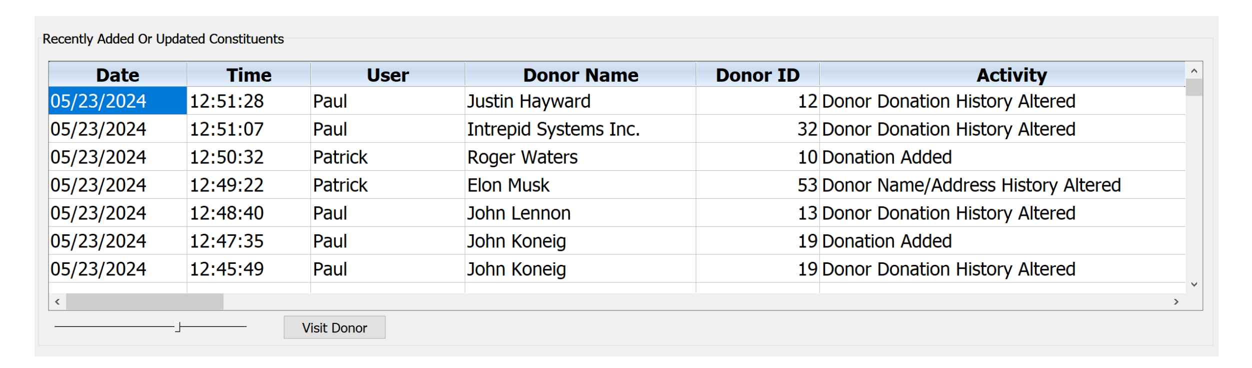


Daily Donation Totals For Current And Past 30 Days

When Added	Daily Total	Count	Average	Top Stimulus	Stim Total	Stim Count	Stim Average
05/20/2024	291,948.00	25	11,677.92	SE	36,756.00	4	9,189.00

Recently Added Or Updated Constituents

This dashboard display will show you all user actions affecting constituent records in realtime as they happen. If you need to investigate an event in more detail, simply click on the Visit Donor button. Here is what the display looks like:



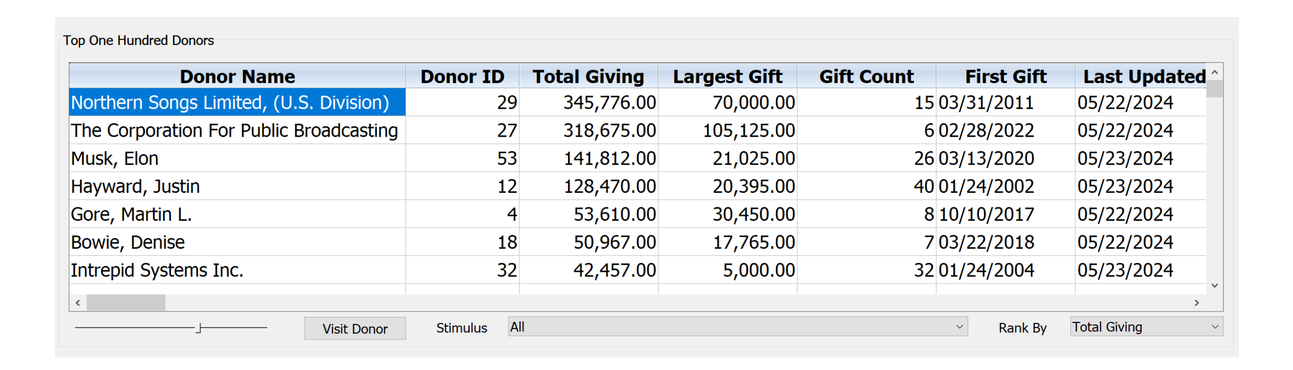
Recently Added Or Updated Constituents

Date	Time	User	Donor Name	Donor ID	Activity
05/23/2024	12:51:28	Paul	Justin Hayward	12	Donor Donation History Altered
05/23/2024	12:51:07	Paul	Intrepid Systems Inc.	32	Donor Donation History Altered
05/23/2024	12:50:32	Patrick	Roger Waters	10	Donation Added
05/23/2024	12:49:22	Patrick	Elon Musk	53	Donor Name/Address History Altered
05/23/2024	12:48:40	Paul	John Lennon	13	Donor Donation History Altered
05/23/2024	12:47:35	Paul	John Koneig	19	Donation Added
05/23/2024	12:45:49	Paul	John Koneig	19	Donor Donation History Altered

Visit Donor

Top One Hundred Donors

Initially this dashboard display will show you your top 100 donors based on lifetime giving. But using the Stimulus selector, you can monitor your top 100 donors for a specific stimulus code. There's also a Rank By selector which allows you to choose between Total Giving and Largest Single Gift. This is used in combination with the Stimulus selector to filter the donors who makes it into your top ten list. You may also order the display by any column by clicking on the title for the column you wish to order on. Clicking repeatedly will toggle between ascending and descending order. There is also a Visit Donor button which you may use to view all information about a specific donor via the DonorQuest Main Information windows, which can be open at the same time as the dashboard, working together to keep all information at your fingertips. Here is what the Top One Hundred Donors display looks like:

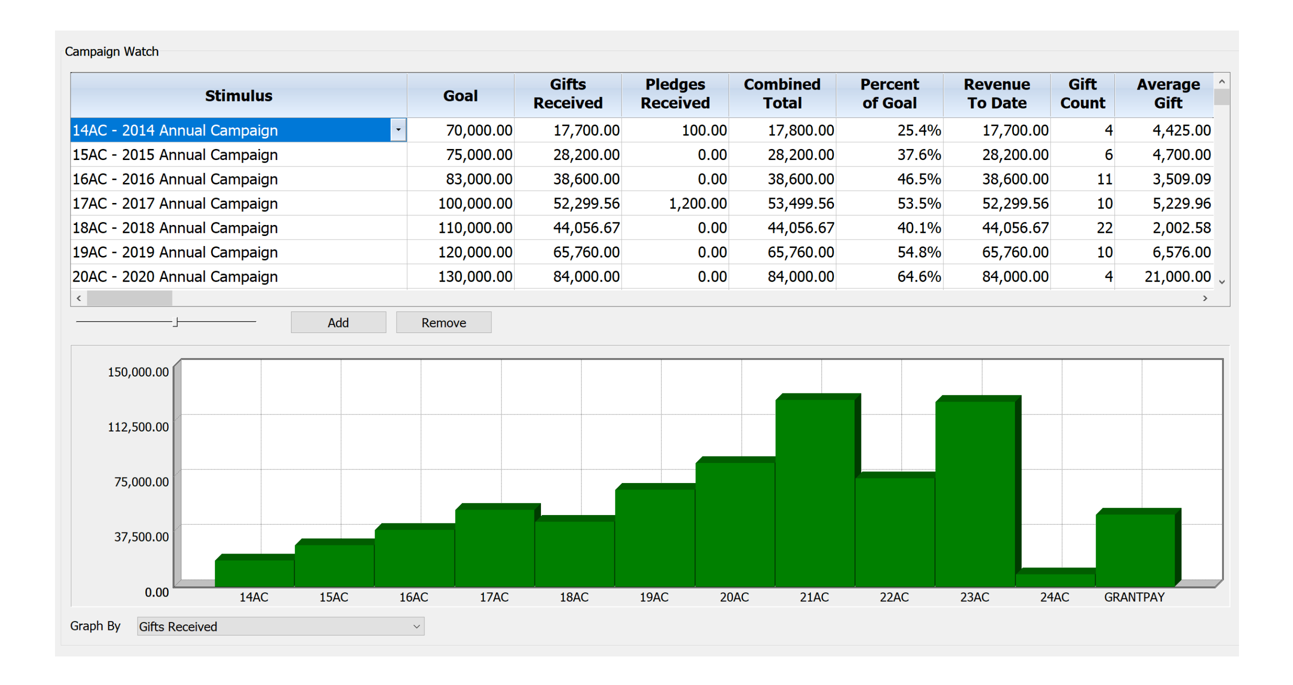


Donor Name	Donor ID	Total Giving	Largest Gift	Gift Count	First Gift	Last Updated
Northern Songs Limited, (U.S. Division)	29	345,776.00	70,000.00	15	03/31/2011	05/22/2024
The Corporation For Public Broadcasting	27	318,675.00	105,125.00	6	02/28/2022	05/22/2024
Musk, Elon	53	141,812.00	21,025.00	26	03/13/2020	05/23/2024
Hayward, Justin	12	128,470.00	20,395.00	40	01/24/2002	05/23/2024
Gore, Martin L.	4	53,610.00	30,450.00	8	10/10/2017	05/22/2024
Bowie, Denise	18	50,967.00	17,765.00	7	03/22/2018	05/22/2024
Intrepid Systems Inc.	32	42,457.00	5,000.00	32	01/24/2004	05/23/2024

Campaign Watch

The Campaign Watch is a combined grid and graph display showing campaign (stimulus) totals. Note that campaigns are driven by stimulus codes in DonorQuest, and there is normally a one-to-one correspondence (so when you see Stimulus, just think Campaign). The graph is linked to the grid so that any changes you make to your preferences in the grid are immediately reflected in the graph, including when you order the grid in ascending or descending order by any of the columns. You may use the Add and Remove buttons to add or remove rows from the grid, and the drop-down arrow in the stimulus column can be used to change the stimulus being monitored. After adding a new row, you need to select the Stimulus it should display information for. Directly below the Campaign Watch grid is the companion graph, showing totals by Stimulus. The horizontal axis of this graph will always show all chosen Stimulus codes from the grid, but you may control the vertical axis via the drop-down control you will see beneath the graph. This control will let you graph by any of the numeric columns of the grid for each Stimulus. Specifically you may choose to graph by Goal, Gifts Received, Pledges Received, Combined Total, Percent of Goal (achieved), Revenue To Date, Gift Count, Average Gift, Pledge Count, Average Pledge, Combined Count, and Combined Average.

Feel free to customize the display as much as you like since all changes are saved under your user account. This allows all DonorQuest users to have their own custom viewing preferences for all dashboard displays without interfering with the preferences of other users. Here is what the Campaign Watch display looks like:


Campaign Watch

Stimulus	Goal	Gifts Received	Pledges Received	Combined Total	Percent of Goal	Revenue To Date	Gift Count	Average Gift
14AC - 2014 Annual Campaign	70,000.00	17,700.00	100.00	17,800.00	25.4%	17,700.00	4	4,425.00
15AC - 2015 Annual Campaign	75,000.00	28,200.00	0.00	28,200.00	37.6%	28,200.00	6	4,700.00
16AC - 2016 Annual Campaign	83,000.00	38,600.00	0.00	38,600.00	46.5%	38,600.00	11	3,509.09
17AC - 2017 Annual Campaign	100,000.00	52,299.56	1,200.00	53,499.56	53.5%	52,299.56	10	5,229.96
18AC - 2018 Annual Campaign	110,000.00	44,056.67	0.00	44,056.67	40.1%	44,056.67	22	2,002.58
19AC - 2019 Annual Campaign	120,000.00	65,760.00	0.00	65,760.00	54.8%	65,760.00	10	6,576.00
20AC - 2020 Annual Campaign	130,000.00	84,000.00	0.00	84,000.00	64.6%	84,000.00	4	21,000.00

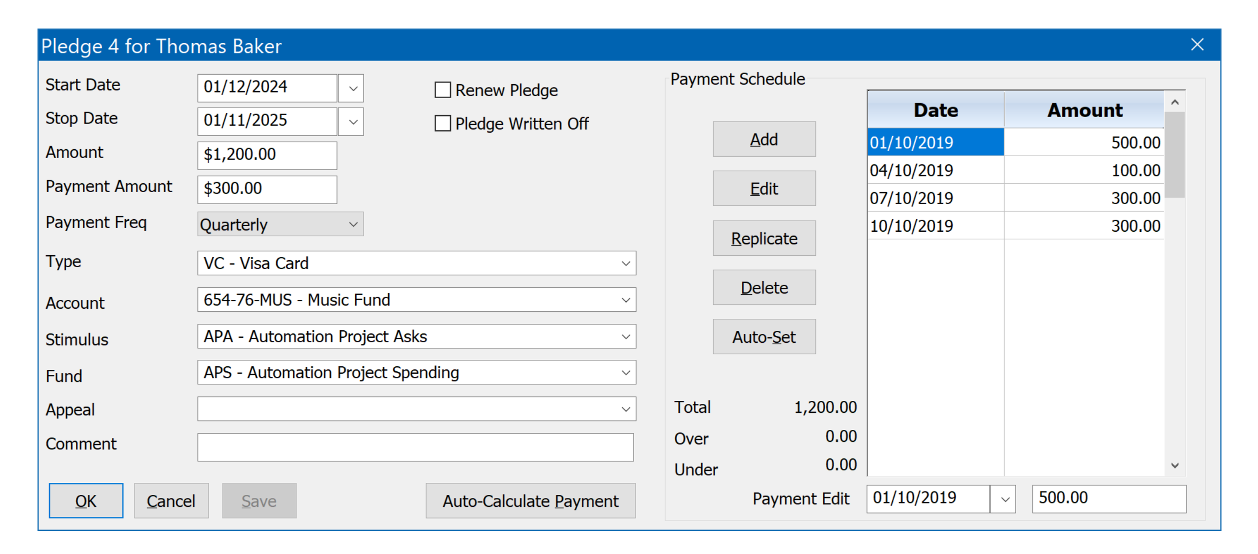
Appeal Watch

This Appeal Watch display within the dashboard is just like the Campaign Watch display, but deals with Appeals instead. Otherwise it has the same grid columns, corresponding graph, and functionality.

Support For Custom Pledge Payment Scheduling

Up to now the DonorQuest pledge payment system (and associated reminder statement reports) required regular pledge payments of equal amounts. It was based on monthly, quarterly, semester, or annual payments for each pledge. A donor could proactively pay more than was due in a payment period, and that would correctly adjust the remaining balance of a pledge on reminder statements, but the payment schedule itself would not change - the donor would simply be "ahead" of it. Now in DonorQuest 7.7, you may schedule pledge payments down to the day for any amount. All that's required is that the sum of the payments add up to the total amount pledged, within the Start and Stop date range of the pledge. This new scheduling is optional, and any existing pledges you have will continue to be serviced normally with our invoicing statements. The new Payment Schedule is an optional feature you may now use with pledges as needed to accommodate any custom payment requirements a donor may have.

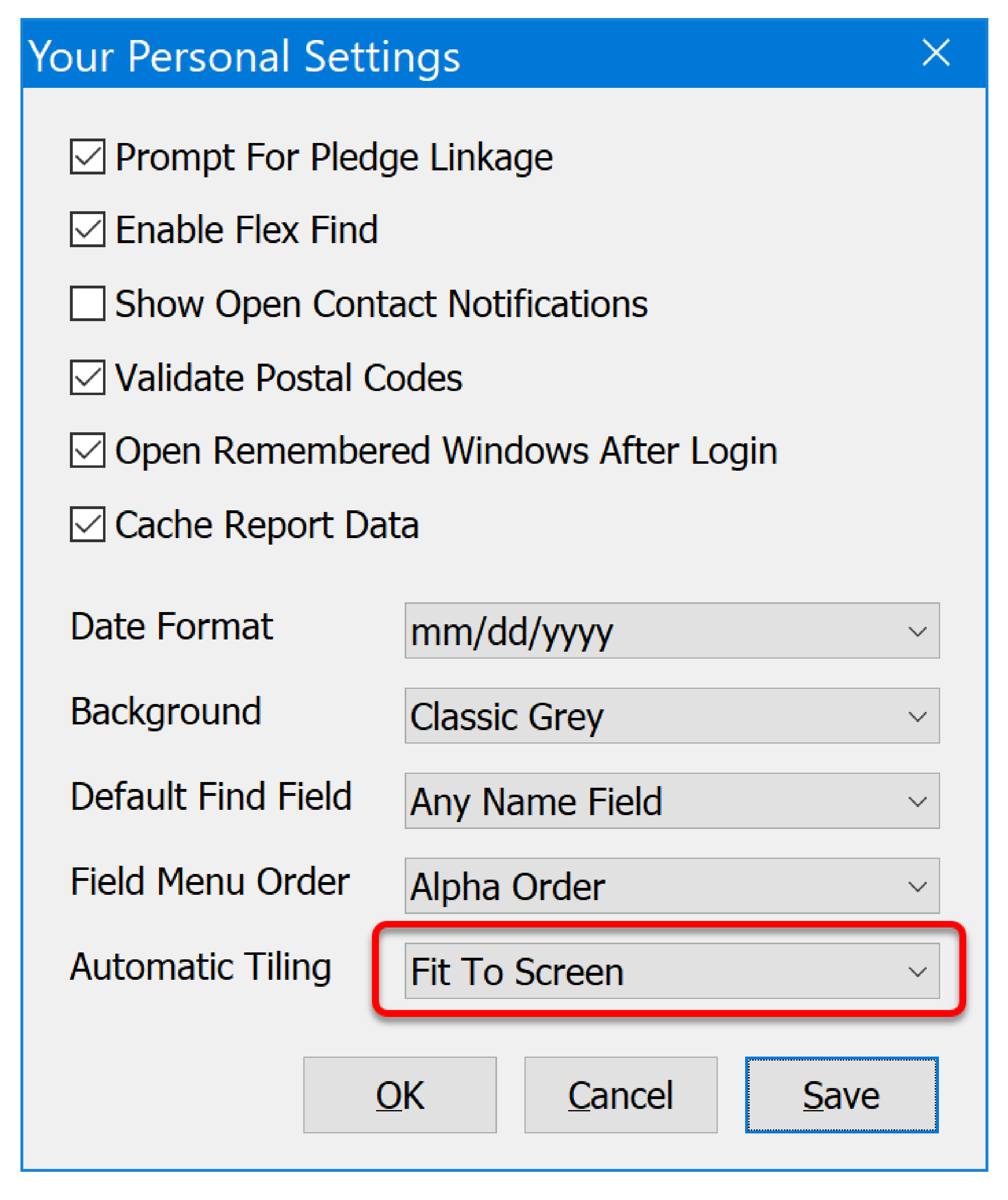
In the following example, we have a basic pledge which spans a year using quarterly payments. Since the pledge is for $1,200, the donor would normally be sent a reminder to pay $300 at the start of each quarter, and that's the only option you had previously. However, in this example the donor has asked that his first pledge payment be $500, his second $100, and the remaining two $300 each. Here is what his payment schedule would look like:



We could also have accommodated irregular payment dates in the above example, or even more than four payments. All that really matters are that the Start/End Dates, and the sum of payments equals the total amount pledged. The Payment Frequency now acts simply as a guideline for initializing the schedule of payments when you click on the "Auto-Set" button inside the Payment Schedule. There is also a new stock report layout named, "Pledge Statements: For Scheduled Payment Pledges" designed to be used universally for all pledges with a payment schedule. This single stock pledge statement report essentially replaces the series of statement reports we have which are based on calculating a payment due amount based on Payment Frequency and Start/Stop dates. However, the older statement reports will be kept in DonorQuest for backwards compatibility. Going forwards you should use the "Auto-Set" button to set a payment schedule when creating a new pledge, and then make manual changes to the schedule only as needed. This will allow the single universal reminder statement we now have to work for all of your pledges.

Automatic Tiling Of Main Windows

Historically DonorQuest has allowed users to open, position, and resize data windows, and DonorQuest simply remembered each user's preferences, opening windows again to the same state they were last in when closed. Of course DonorQuest will still do this if you wish, but now there is a new Personal Settings option called Automatic Tiling. This optional feature can be used to have DonorQuest automatically resize and position data windows as you open and close them, always making optimal use of available screen space within the main DonorQuest program window. This is particularly helpful if you use DonorQuest on multiple workstations with different screen resolutions. You can access the available automatic tiling settings by clicking on User, Change Your Personal Settings. You will see the new option at the bottom of the Personal Settings dialog, as shown here:

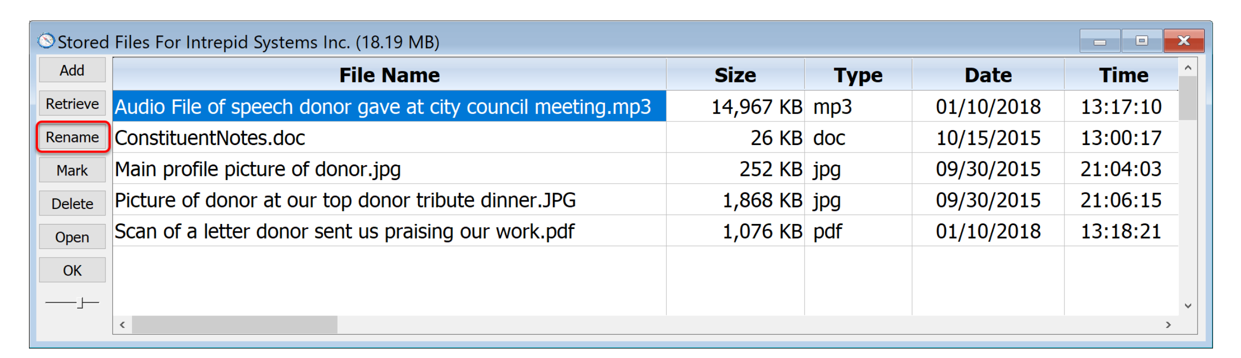


When first trying this option, use the, "Fit To Screen" setting, as shown above. This will arrange windows vertically, making optimal use of screen space each time you open or close a window. For example, if you open only the main name/address window, it will fill the DonorQuest program window. If you then open the Donations window, the two open windows will each take half of the available space. Opening a third window will divide the space in thirds, and so on. As you close windows, the process is reversed, automatically allowing the remaining open windows to reclaim optimal equal space. Of course any

changes to column widths and positions you have made within data windows will still be preserved just as they always have. It is only the window sizes and positions which are automatically changed. Give it a try!

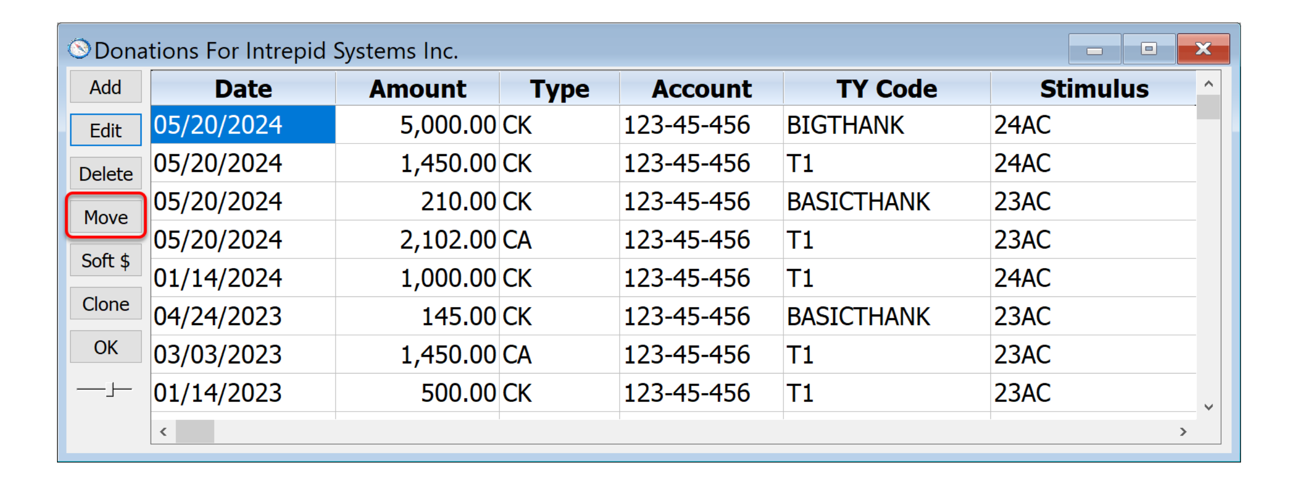
Rename Button Added To Stored Files Window

DonorQuest can store files of any type in a donor's account, such as audio files, picture files, or PDF's. The list of stored files for each donor can be accesses by clicking on the Files icon on the DonorQuest Toolbar. Previously there was no way to rename a file once it had been stored (other than retrieving it, renaming it in a folder on your computer, deleting the original, and adding back the renamed file). Now there's a new Rename button in the Stored Files window, as shown here:



Move Button Added To Donations, Pledges, And Contacts Windows

Mistakes happen and sometimes a donation, pledge or contact get added to the wrong donor account. Previously you would have to delete the incorrect entry and re-enter it. Now with the new Move button you can easily correct such an entry. Simply highlight the donation, pledge, or contact which needs to be moved and click the Move button. DonorQuest will then allow you to interactively search for the correct donor account, and offer a final confirmation before completing the move. When searching for the correct account, you may search by any column of the Main Information Window, including names, addresses, email addresses, etc.



Real-Time Updates For DonorQuest Event Log

DonorQuest stores detailed tracking information for the activities of all users. Everything from when each user logged in, to when they logged out is chronicled. The DonorQuest Event Log, accessed by clicking on File, Open, The Event Log, has always been a valuable resource for administrators to monitor activity in a multi-user environment. Now, whenever the highlight is left positioned on the first row of the Event Log window, new events will automatically be added as they occur, scrolling older events down in the display grid. If you have a number of users all doing things at the same time in DonorQuest, it can actually be very informative (as well as entertaining) to just sit back and watch all the activity just roll into the log as it happens.

September, 2019

18.3 What Was New In DonorQuest 7.6

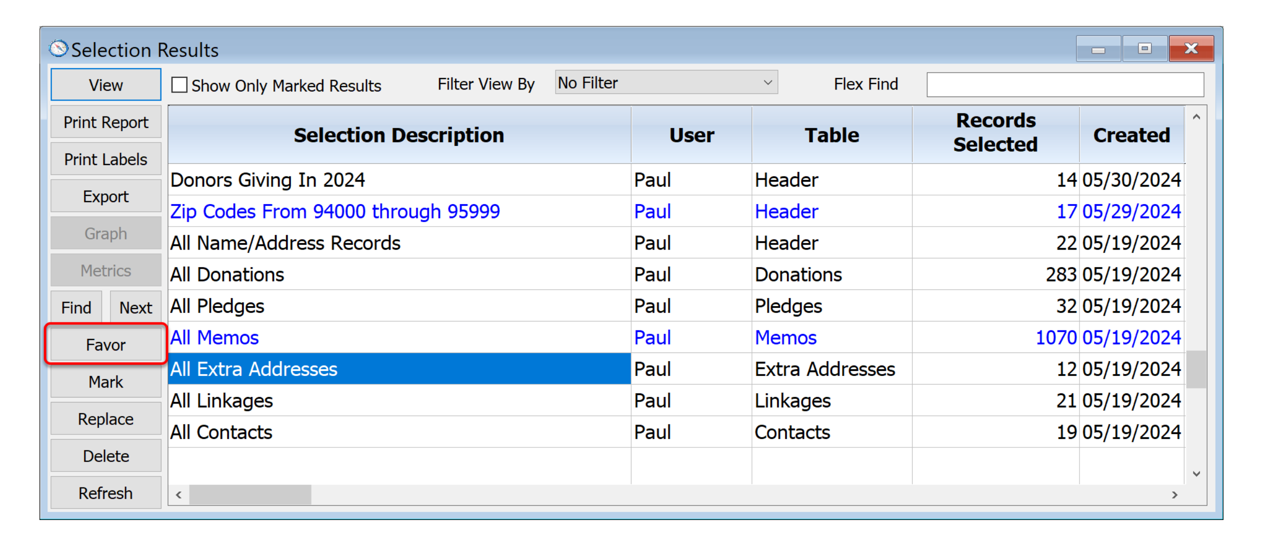
DonorQuest 7.6 includes some significant enhancements as outlined below. If you are upgrading from a version of DonorQuest earlier than 7.5 (the previous release), you should also consult the various "What's New..." documents, available under the, "What Was New In Previous Releases" topic of this User's Guide. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

Here's an overview of the new features in DonorQuest 7.6:

Ability To Favor Selection Results

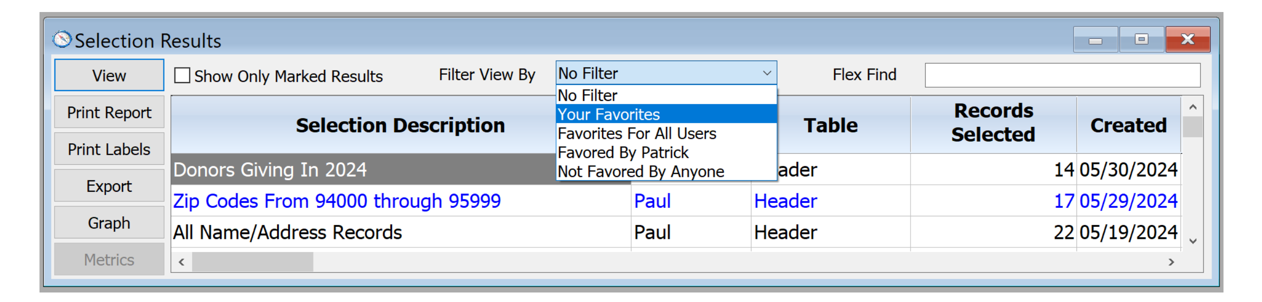
As you may know, DonorQuest allows thousands of Selection Results to exist, and they are in a single window shared by all users. Now within the Selection Results window, there is a new button which allows you to personally mark a selection result that you would like to have quick access to without having to search for it. Essentially, you will be able to maintain a personal list of the Selection Results you use most frequently, and this list is tied to your

DonorQuest user account, so each user can have their own list. When you favor a Selection Result, it will turn blue and remain blue between sessions until you unfavor it, as shown here:

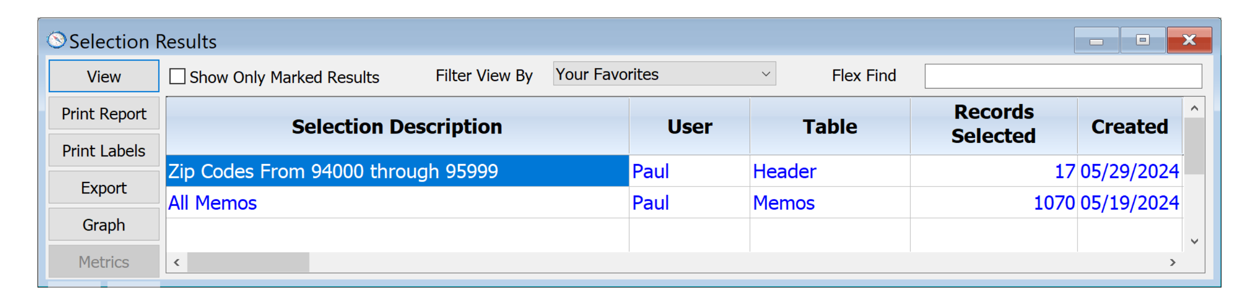


Ability To Filter Selection Results Window

The Selection Results window now has a new, "Filter View By" option allowing you to filter the results which are shown. You may choose to see only your favorite selections, favorites for all users, favorites for a specific user, or all the results not favored by anyone, as shown here:



Here is how the display would look showing, "Your Favorites" when user Paul is logged in:



Flex Find Added To Selection Results Window

The Selection Results window now has a new, "Flex Find" option (shown above) allowing you to filter the results based on keywords or phrases which occur in the Selection Description, User Name, or Table columns. This serves as a complement to the Find and Next buttons which also allow you to search for keywords and phrases in selection descriptions, but do not filter the display.

First Letter Search In All Columns Of All Data Grids

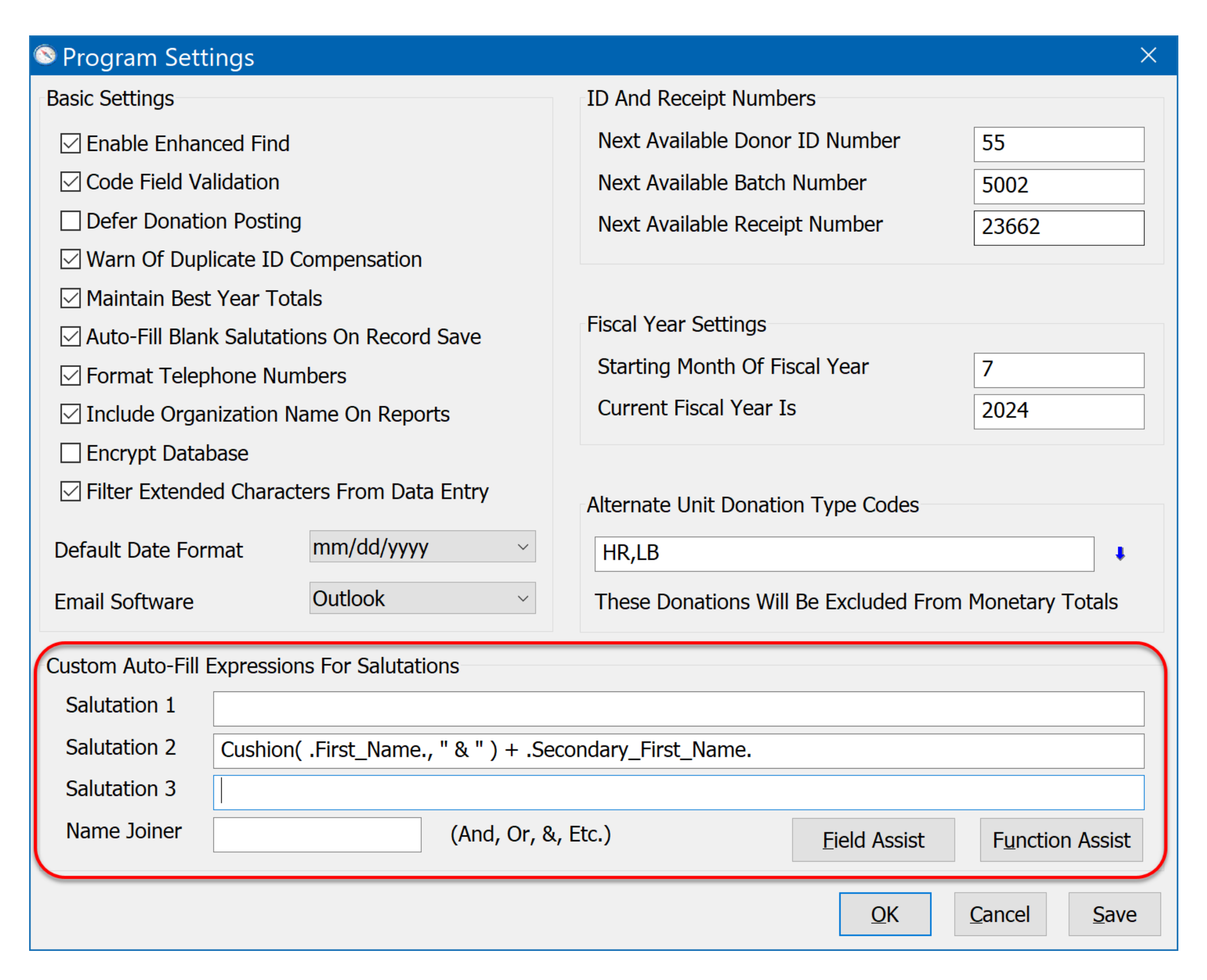
Now you may do simple searches on any column of any data grid. Simply move the highlight to the column you wish to search and type a letter or number. This is a very simple search, only looking at the first letter of data values in the column you're searching. It's not meant to replace any of the advanced forms of searching, such the Flex Find or the Progressive Search of the Main Information window, but rather it is a quick way to navigate the grid windows which do not have an explicit way of searching reserved for them. For example, if you are looking at a donor who has a lot of donations, and you would like to browse through any donations with a Stimulus code of SPRING, simply place the highlight in the Stimulus column and repeatedly press the "S" key. The donation display will scroll as the highlight moves from row to row, jumping from one Stimulus code starting with "S" to the next.

Titles And Suffixes Now Included In Salutation 1 Auto-Fill

The auto-fill formula built into DonorQuest for Salutation1 (the formal salutation) now includes the primary and secondary donor's title and suffix if present. As always, you may override the auto-fill as needed on a case-by-case basis, and DonorQuest will keep your changes.

Auto-Fill For All Salutation Fields Now Customizable

While DonorQuest still has the built-in formulas it uses to auto-fill Salutation 1 and Salutation 2, and they work well for most organizations, now those formulas may be replaced with your own, and you may even set an auto-fill formula for Salutation 3 now. To customize the Salutation auto-fills for your organization, click on Configure, Program Settings, which looks like this:



Notice that we have a single formula for Salutation 2 auto-fill, and we left the formula for Salutation 1 blank so that DonorQuest will use its internal formula for that. The new "Name Joiner" option allows you to specify the joiner to be used between the primary and secondary donor. Normally "And", "Or", or "&" is used here. If left blank then DonorQuest will default to using the "&" symbol with its internal auto-fill formula for Salutation 1.

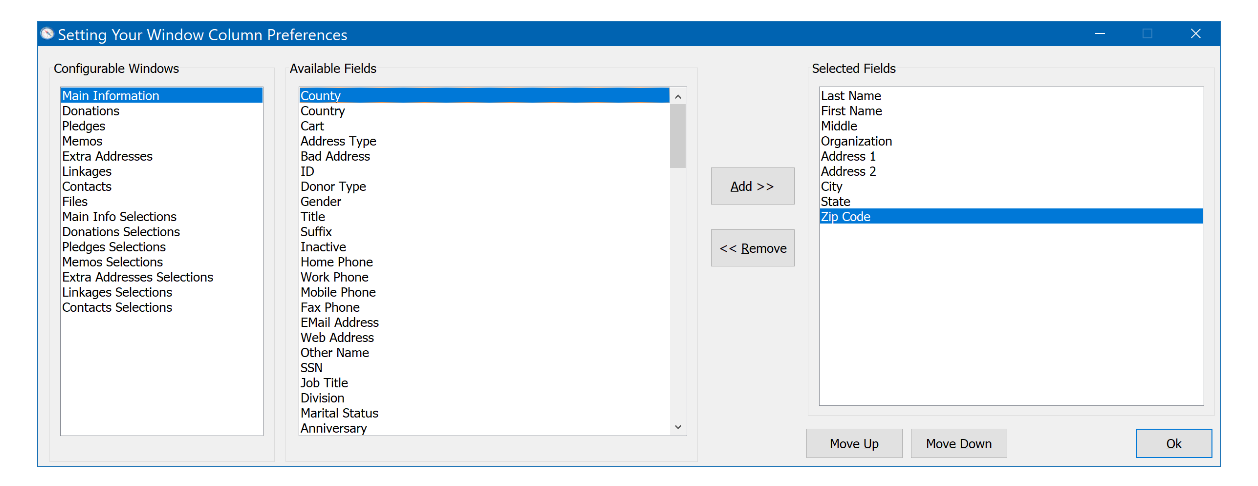
Salutation Fields Now Auto-Filled During Import

DonorQuest will now auto-fill the salutation fields as new records are brought in during a data import. This will only happen for the Salutation fields not being assigned data from the import itself. Also, the checkbox must be on for, "Auto-Fill Blank Salutations On Record Save" under Program Settings (shown above).

Easier Now To Make Big Changes To Your Custom Window Preferences

It has always been possible to adjust column positions in the various spreadsheet-style windows in DonorQuest by clicking and holding down the left mouse button on a column header and dragging left or right. You could also do a right-mouse-click on any column title

and turn on or off the display of a column using the resulting pop-up menu. While this is fine for simple on-the-fly customizations, making wholesale sweeping changes was cumbersome using this method. Now there's a new way to easily edit your window display preferences. When you click on User, Change Your Window Column Preferences, you will see the following:



The, "Configurable Windows" pane shows all of the windows in DonorQuest which allow customization. As you scroll through the window names, you will see the, "Available Fields" pane update to show all of the available fields (columns) for the currently highlighted window. The, "Selected Fields" pane shows the fields (columns) which will actually be displayed for the window. You can use the Add>> button to move Available Fields to Selected Fields. The <<Remove button will take the currently highlighted field in the Selected Fields pane and move it back to the Available Fields pane, effectively taking it off the actual display you will see for the corresponding window. The "Move Up" and "Move Down" buttons directly below the Select Fields pane will move the currently highlighted field up or down, corresponding to a left or right movement for the column which will show the field contents when you use the window. Any changes you make here are for your DonorQuest account only and do not affect other users. Changes are saved immediately, so you may simply click the OK button when you're done making changes.

New DonorQuest Icon

Last but not least, DonorQuest now has a new icon which looks like this:



June, 2018

18.4 What Was New In DonorQuest 7.5

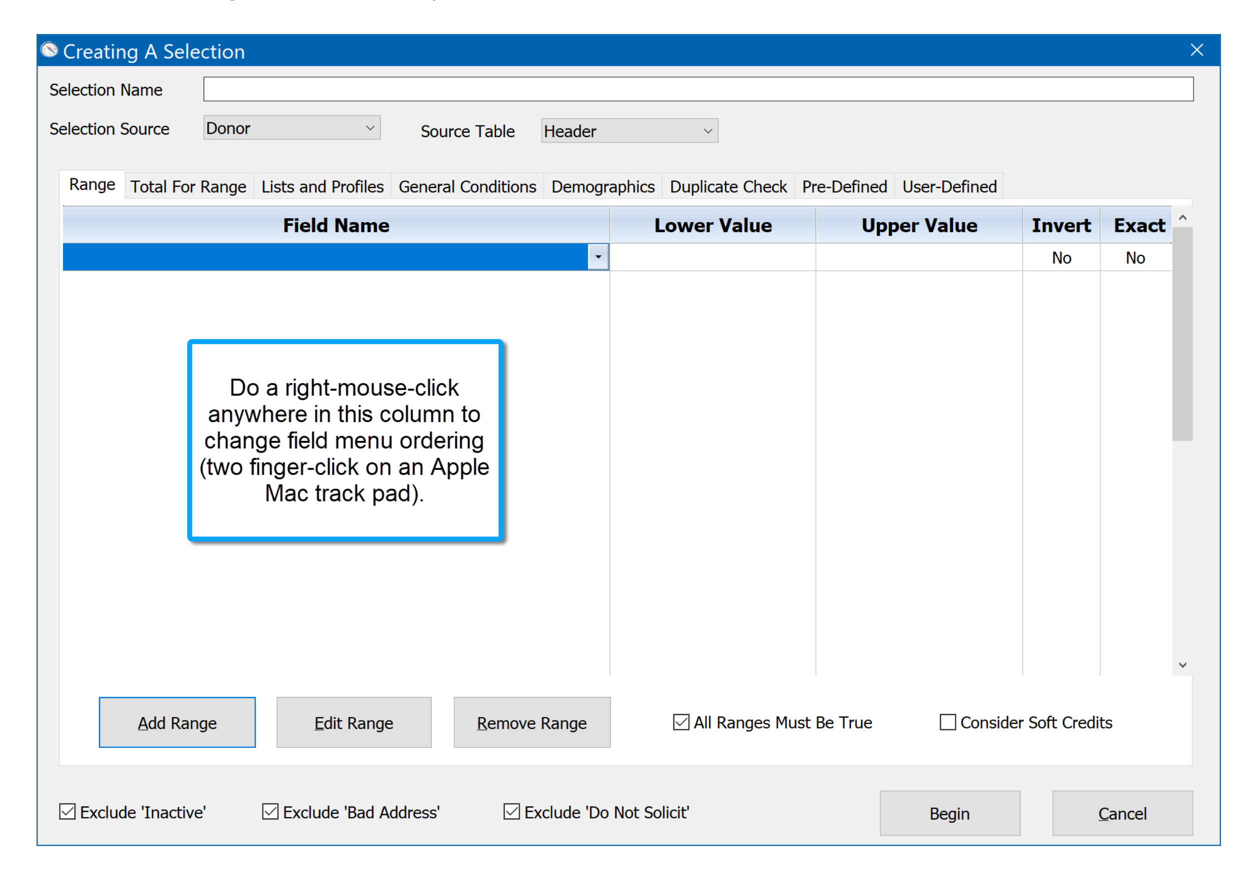
DonorQuest 7.5 includes some significant enhancements as outlined below. If you are upgrading from a version of DonorQuest earlier than 7.4 (the previous release), you should also consult the various "What's New..." documents, available on the DonorQuest website. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

Here's an overview of the new features in DonorQuest 7.5:

Optional Alpha Ordering For Field Menus

This has been a long requested feature. You now have the choice of seeing field menus ordered as they appear on the data entry forms as they have always been, or you may choose to see them in alphabetical order. To change your preferred view, click on User, Change Your Personal Settings. For there you will see a checkbox labeled, "Field Menu Order" with an associated drop-down list allowing you to set your preferred order. This is a personal setting, so it will be for your DonorQuest login account only and will not affect the

way other users see their field menus. You may also change field menu ordering on-the-fly when running Selections by doing a right-mouse-click anywhere within the Field Name column in the Range tab, or anywhere within the Field Name column of the General Conditions tab. Doing so will also have the same effect as making the change in your personal settings options, and your preference will be remembered between sessions:

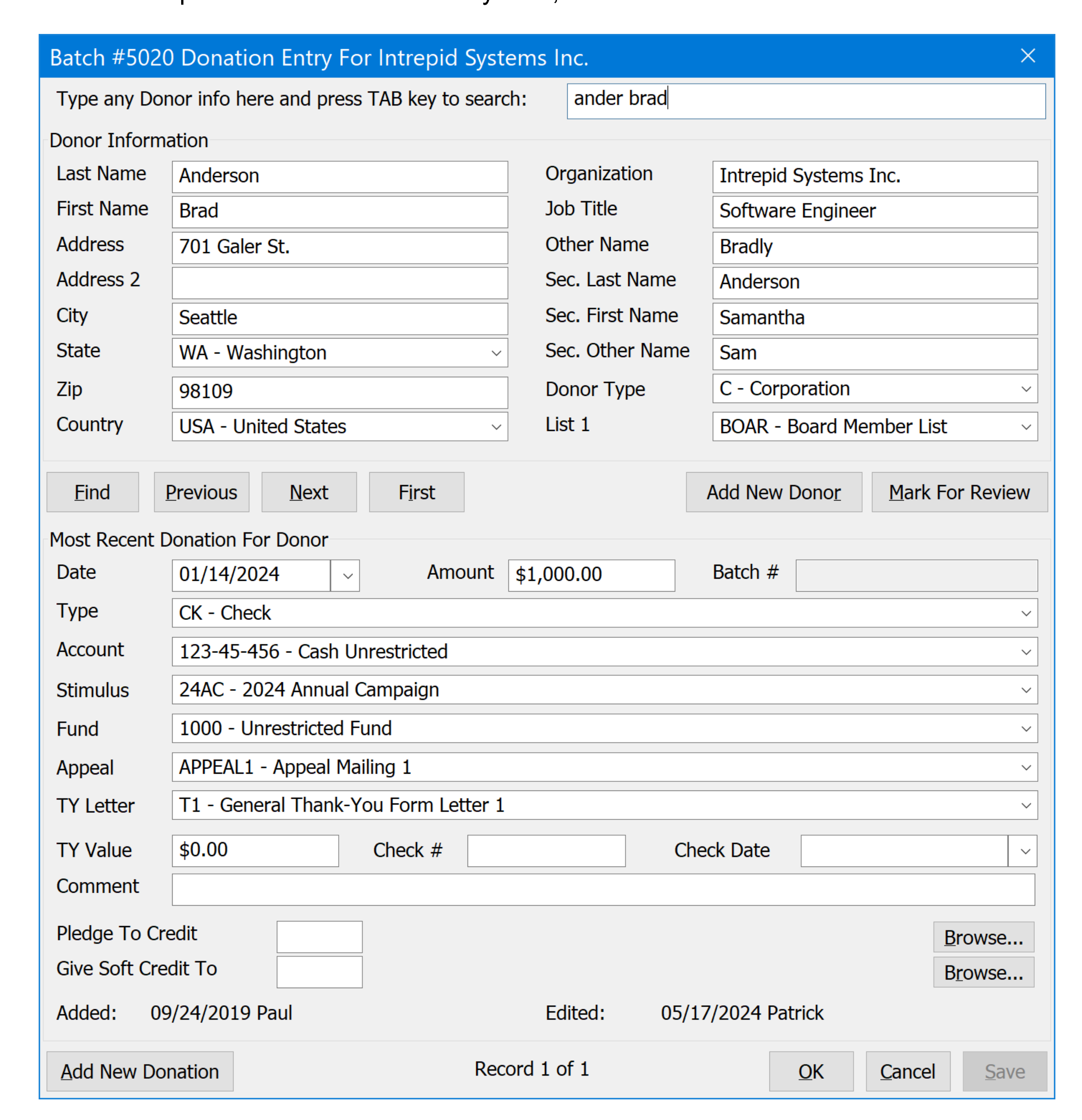


Flex Find Is Now Available In Batch Donation Entry

Flex Find is the amazing new way to search for constituent records in the Main Information window which was added in DonorQuest 7.4. Now it is also available when doing batch donation entry under the Donor, Batch Donation Entry menu option. As a reminder, the Flex Find is a bit like the, "Any Name Field" option of the regular Find, but it simultaneously searches across many fields (not just the name fields), and it is far more flexible in how it does so. You can enter partial names in any order (including partial words of an organization name), and combine bits and pieces of multiple fields in a single search. For example, if you are looking for, "The ABC Foundation For Exceptional Generosity", with an address of "1234 Main Street", and a main contact person of, "Elon Musk", all of the following search keys would work:

ABC 123
Gen Excep
Foun ABC
Elon Foun

The Flex Find search field is always available at the top of the Main Information window, and now at the top of the batch donation entry form, as shown here:



You may enter a search term in the Flex Find blank and click the Flex Find button to begin a search, or just press the Return key on your keyboard. You may also use the Tab and Shift-Tab key combinations to move between the Flex Find entry blank and the data fields of the Donation Batch Entry form.

Flex Find Extended To Extra Addresses

Extra Address records are now included in the Flex Find feature of the Main Information

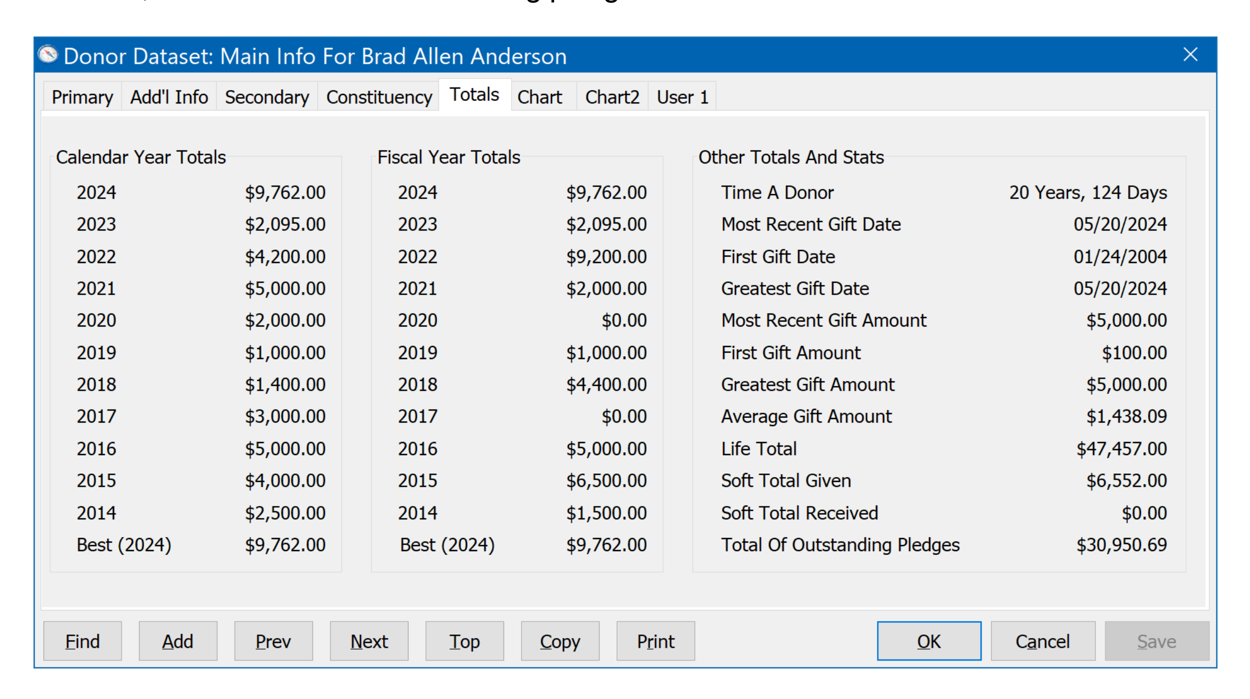
Window. Extra addresses provide a way of storing an unlimited number of extra email and mailing address records for each of your constituents. Constituent records may now be found in the Main Information window by searching for name, address, and email entries which exist in the Extra Address form.

Email Address Field Added To Extra Addresses

The Extra Address form in DonorQuest now includes an email address field. This essentially allows an unlimited number of email addresses to be associated with each constituent. Furthermore, since the Extra Addresses are included in the new Flex-Find feature, you will be able to find a constituent account by searching on an email address, no matter where the email address is stored.

Main Information Form Wider With More Totals

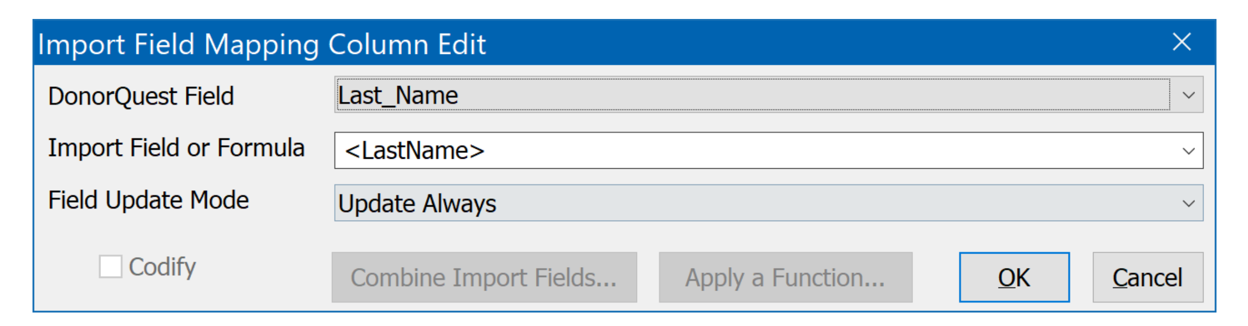
All tabs of the Main Information Form have been widened for easier viewing and entry. Plus, the Totals tab now includes giving totals for the current and past ten years, best year ever, time since donor's first gift, date of first gift, date of greatest gift, most recent gift amount, first gift amount, greatest gift amount, average gift amount, life total, soft total given & received, and the total of all outstanding pledges:



Conditional Update of Fields During Data Import

When importing data to DonorQuest, often you may be importing additional data for existing constituents. For example, you may be importing new online donations for existing donors. Since online information is entered by the donors themselves, you may wish to prevent information they provide from overwriting specific existing information in your DonorQuest database. If you have higher confidence in the existing address information in DonorQuest than what is in your import source, you can now tell DonorQuest to only update the address fields of an existing donor if they are blank in DonorQuest. This means that donors who are

new will have their address information populated from what they enter in an online form, while existing donors will have their address information protected during an import. This is all controlled at the field level via the import mapping. Here's an example of using the, "Update Only If Target Empty" mode for the Address field:



There is also a new Field Update Mode of, "Update Only If Source Has Data." This is useful when you have high confidence that the data you're importing is more up-to-date than what exists currently in your database, but you want to prevent existing data from being blanked out if a particular import record has no data for the field. For example, if you are importing phone number updates to the main constituent phone number field and you use the, "Update Only If Source Has Data" mode, then the existing phone number for a given constituent will be preserved if the new phone number from the import file happens to be blank. If the phone number from the import file is not blank, it will replace the existing phone number for the constituent. DonorQuest will make this determination for each constituent record as the import proceeds.

Smart Address Matching During Import

When importing data, DonorQuest will normally try and find an existing constituent record to update before creating an entirely new constituent. This matching attempt consists of looking for an exact Constituent ID match first, and failing that an email match next, and failing that a match with name and address. Previously, the existing address had to match exactly with data from the import file to constitute a match. Now DonorQuest will translate all address abbreviations to their full spellings before comparing existing addresses to addresses coming from the import file. This translation is done "behind the scenes" and does not affect the imported address data if the address field is designated for update from the address in the import file. For example, if an existing constituent record has an address of, "1234 First Avenue Northeast", and an imported record has an address of, "1234 1st Ave NE", the addresses will still match. The imported abbreviated address will then conditionally replace the existing address, based on the Field Update Mode you have selected (see above).

Smart Address Matching During Duplicate Check

The Duplicate Check tab of the DonorQuest Selection dialog has been enhanced to take advantage of the new address processing capabilities in DonorQuest. When running a duplicate record check which includes the Address or Extra Address fields, DonorQuest will now translate all address abbreviations to their full spellings before comparing two addresses (this is done just for the purpose of comparison, without any changes to the database). So now suspected duplicate constituent records will be identified even if different

address abbreviations (or none at all) were used in each of the constituent records being compared. Periods are also ignored, so it doesn't matter whether one address may have abbreviations with periods, while the address it is being compared with does not.

Mass Address Updating For Standardization

The Replace feature of the Selection Results window in DonorQuest now has the ability to make sweeping changes to existing addresses in your database in order to standardize them. There are essentially three types of standardizations you may choose from - No Abbreviations, Abbreviations, and Abbreviations with periods. The No Abbreviations standardization would expand all addresses to have the full spellings of street suffixes and directionals, resulting in addresses such as, "1234 First Avenue Northeast." Abbreviations would result in addresses such as, "1234 1st Ave NE", and Abbreviations with periods would result in addresses such as, "1234 1st. Ave. N.E."

USPS Address Standardization For Exports

DonorQuest is now capable of exporting address information in USPS standardized format, which consists of all uppercase with abbreviations and no periods. For example, addresses would appear as, "1234 1ST AVE NE" in the resulting export file. Note that standardizing addresses during export has no effect on the existing address information in your database - addresses are simply translated during export.

Remembering Your Favorite Export Groups

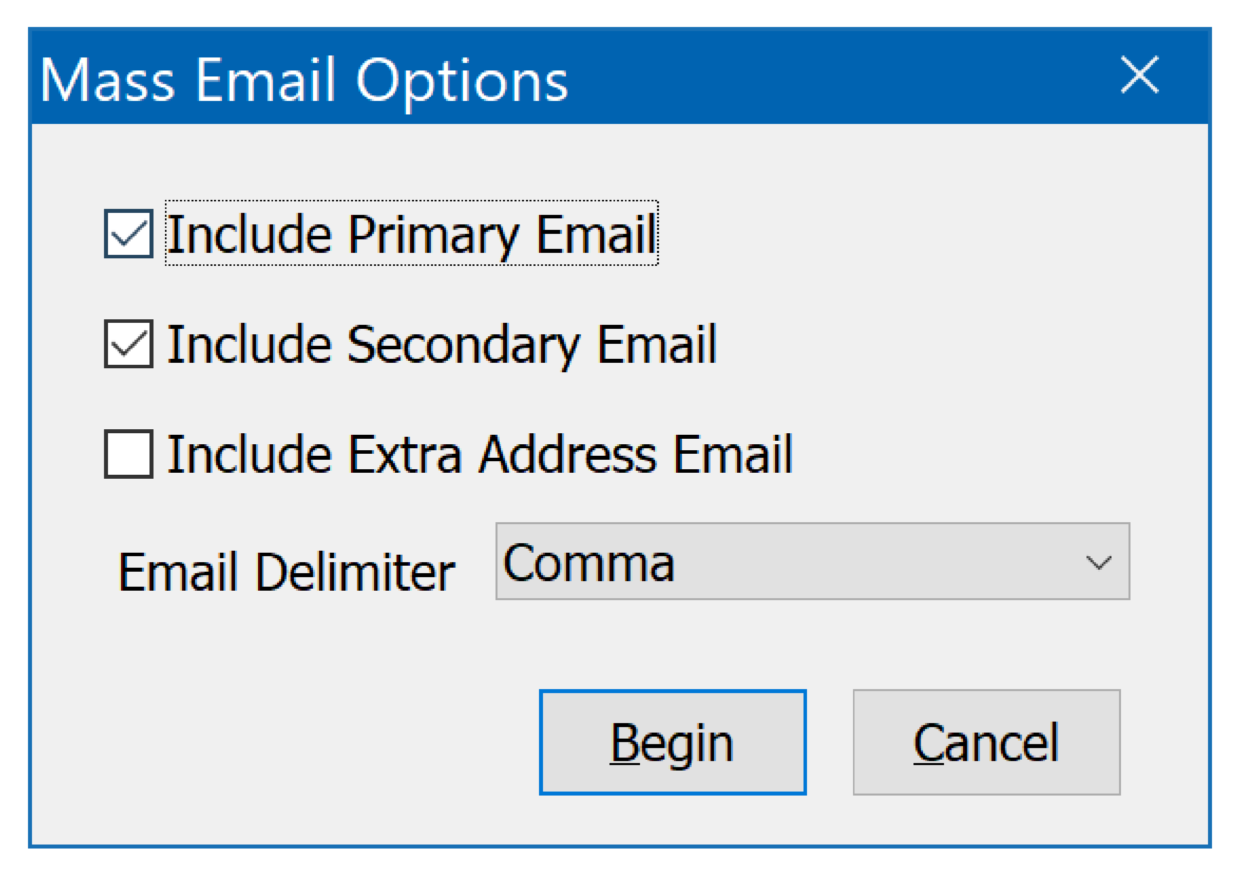
DonorQuest 7.4 introduced the ability to maintain a personalized list of the report layouts you use most often, so that you can get to them quickly. Now this same capability has been added to the export facility in DonorQuest. When the DonorQuest Export menu is open, you will see a new, "Favorite Field Groups" tab. Clicking the, "Add Favorite" button will add the currently highlighted field group to your personal list of favorite field groups.

Title And Suffix Support In Salutation Auto-Fill

DonorQuest will now include both the Primary and Secondary title and suffix fields when auto-populating the Salutation1 field. Since both the title and suffix are coded fields, the code descriptions will actually be used, so be sure you have entered descriptions for all of your title and suffix codes (this can be done using the Configure, Edit/Print A Code Table option). As always, you may override DonorQuest auto-fill entries for Salutation1 and Salutation2 for a specific constituent by simply typing how you wish the Salutations to appear. DonorQuest will never auto-fill a field which already contains an entry. DonorQuest will also take care to never auto-fill using the name information of a partner marked as deceased via the deceased date fields of either the Primary or Secondary tabs.

Mass Email Feature Expanded

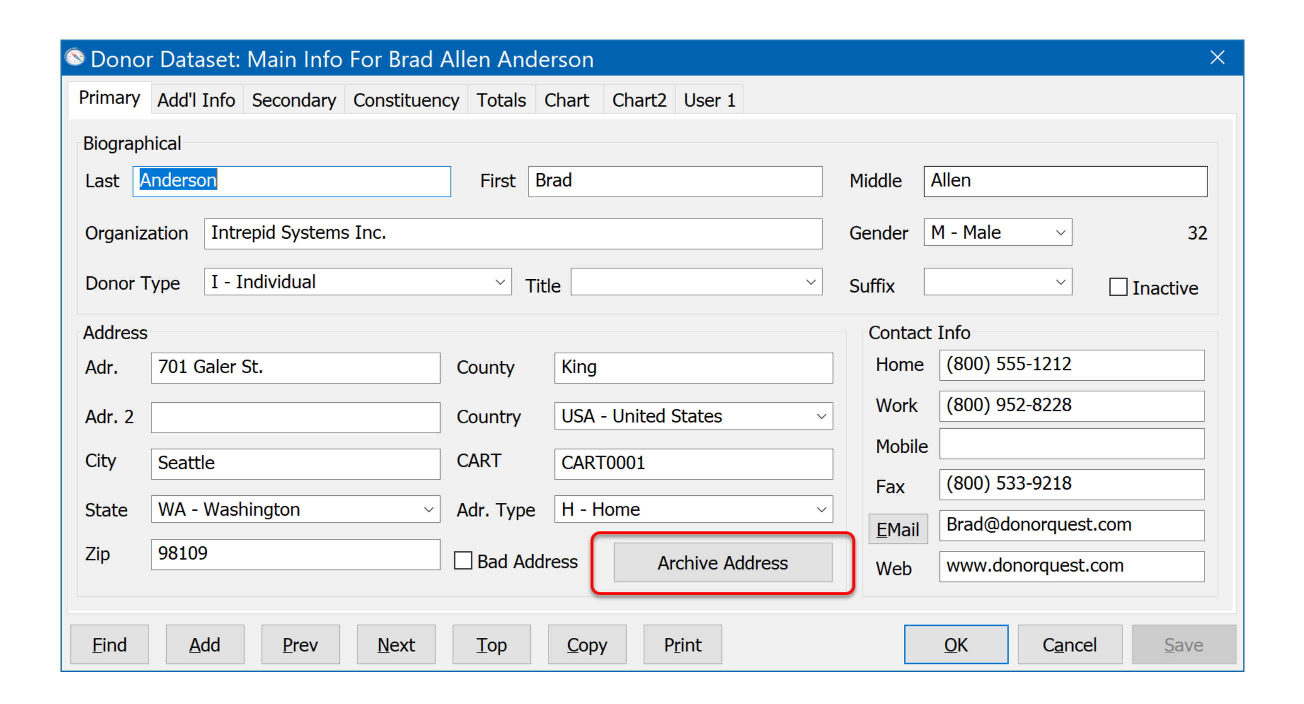
Previously, DonorQuest would allow you to do a mass email from a Selection Result to the email address entered on the Primary tab of each constituent. Now, DonorQuest will also optionally include the email address of the Secondary (spouse) tab, and/or the email address on any Extra Address records for each constituent account. When you highlight a specific Selection Result of constituents you wish to email and click on Selection, Do Mass Email From, you will now see this dialog:



You may also run a Selection for specific Extra Address records across all constituents, and only send to the email addresses of the selected extra address records. This can be very useful if you have, for example, a newsletter you only wish to send to some constituents. You could create an extra address record for this specific purpose and code it for Newsletter. Then you could run a selection of Extra Address records coded for your newsletter mailings. This also allows the use of alternate email addresses for your newsletter mailing as needed for each constituent.

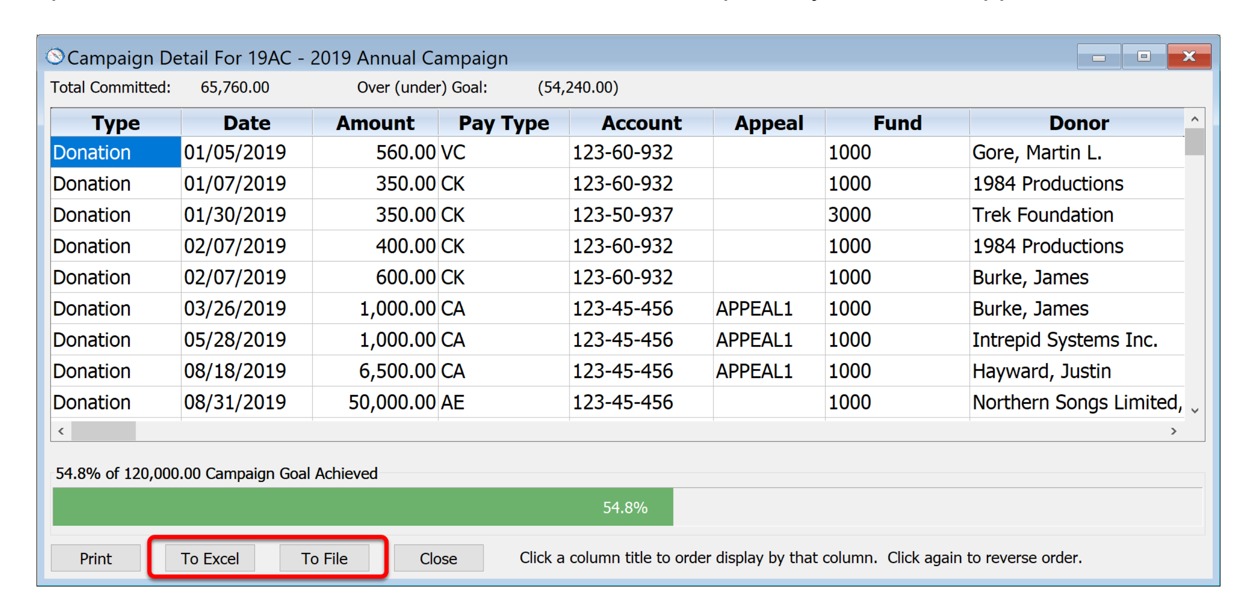
New Archive Address Button For Main Address

The Primary tab of the Main Information window now contains a new Archive Address button which can be used to make a copy of the main address. The copy is saved as an Extra Address, which each constituent may have an unlimited number of. This provides an easy way to keep track of all previous addresses for each constituent if you wish to do so. If you are about to make an address change for a constituent and you wish to keep a copy of the old address, simply click the Archive Address button before saving the new main address, as shown here:



New Export Options For Campaign Summary

The DonorQuest Campaign Summary window has always been a great place to monitor how each of your campaigns is doing in real time, providing an up-to-the-minute composite display of all donations and pledges received, and percent of goal for the campaign achieved. This window is accessed by clicking on Reports, Campaign Detail, and then double-clicking on the campaign you wish to see detail for. Now the Campaign Summary window includes buttons for directly copying the information in the window to a new Excel spreadsheet, or to a csv file which has universal compatibility with other applications:



Updated Internal Zip Code Table

As with all updates, this release of DonorQuest also has an updated internal zip code table which contains all the City, State, Counties, and 5-digit zip code combinations in the United States. This is used to support the auto-entry of city, state, and county for you when adding a new constituent. Remember, to use this feature, all you have to do is enter the zip code for a new constituent and press the Tab key. Leave the city, state, and county fields blank, as they will be filled in for you automatically when you Tab out of the zip code field. This updated internal table also supports the System, Auto-Fill Empty Salutation And County Fields option. This feature searches your entire database, automatically filling in any missing Salutation and County fields.

All Stock Reports Streamlined

All of the built-in report layouts in DonorQuest have been streamlined to remove unneeded dollar signs in columns. Row spacing has also been increased slightly in all reports to improve readability where a lot of amounts are shown in adjacent columns.

New Standard Reports Added

DonorQuest 7.5 includes the following new standard reports:

Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year
Donations - Dollar Totals Of Gifts In Dollar Ranges By Calendar Year And Week
Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year
Donations - Dollar Totals Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Donation Detail Report - Ordered By Donation Date
Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Current Cal Year's Total
Donations - Donor Name, Phone, Donation Amount And Stimulus, Ordered By Prev Cal Year's Total Giving
Donations - For Mail Merge With Selected Donations Totalled By Donor
Donations - Grouped By Account, Ordered By Constituent Name Within Account
Donations - Grouped By Donor Name With Address, Donation Totals, Counts, And Averages
Donations - Grouped By Donor Name With Calendar Year Totals And Counts
Donations - Grouped By Donor Name With Donation Totals, Counts, And Averages
Donations - Grouped By Donor Name With Fiscal Year Totals And Counts
Donations - Grouped By Donor Type, Giving By Fiscal Year With Counts
Donations - Grouped By Stimulus, Subgrouped By Donation Type
Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Subsorted By Giver
Header - 3-Year Comparison Of Year-To-Year Calendar Year TY Amounts, With Totals
Header - Calendar Year Totals And Donation Counts For Previous Two Years
Header - Calendar Year Totals And Donor Counts For Previous Two Years
Header - Comparison Of Month-To-Month Giving, Current Calendar Year With Donor ID
Header - Fiscal Year Totals And Donation Counts For Previous Two Years
Header - Fiscal Year Totals And Donor Counts For Previous Two Years

March, 2017

18.5 What Was New In DonorQuest 7.4

DonorQuest 7.4 includes some major enhancements such as the new Flex Find in the Main Information Window, and the Donor Demographics tab in selections, but it also has a lot of subtle, "nice to have" enhancements, such as the ability to remember your favorite report layouts making them easy to find when you're in a hurry, and new application-wide vertical and horizontal scroll bars which let you arrange and scroll all DonorQuest content as if it were on a web page. If you are upgrading from a version of DonorQuest earlier than 7.3 (the previous release), you should also consult the various "What's New..." documents, available on the DonorQuest website. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

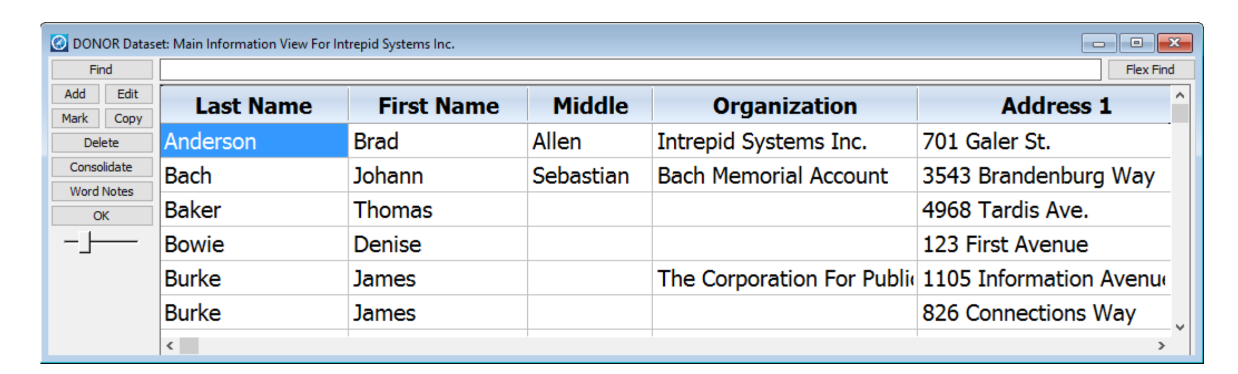
Here's an overview of the new features in DonorQuest 7.4:

Flex Find

Flex Find is an amazing new way to search for constituent records in the Main Information window. It is a bit like the, "Any Name Field" option of the regular Find, but it simultaneously searches across many fields (not just the name fields), and it is far more flexible in how it does it. You can enter partial names in any order (including partial words of an organization name), and combine bits and pieces of multiple fields in a single search. For example, if you are looking for, "The ABC Foundation For Exceptional Generosity", with an address of "1234 Main Street", and a main contact person of, "Elon Musk", all of the following search keys would work:

ABC 123
Gen Excep
Foun ABC
Elon Foun

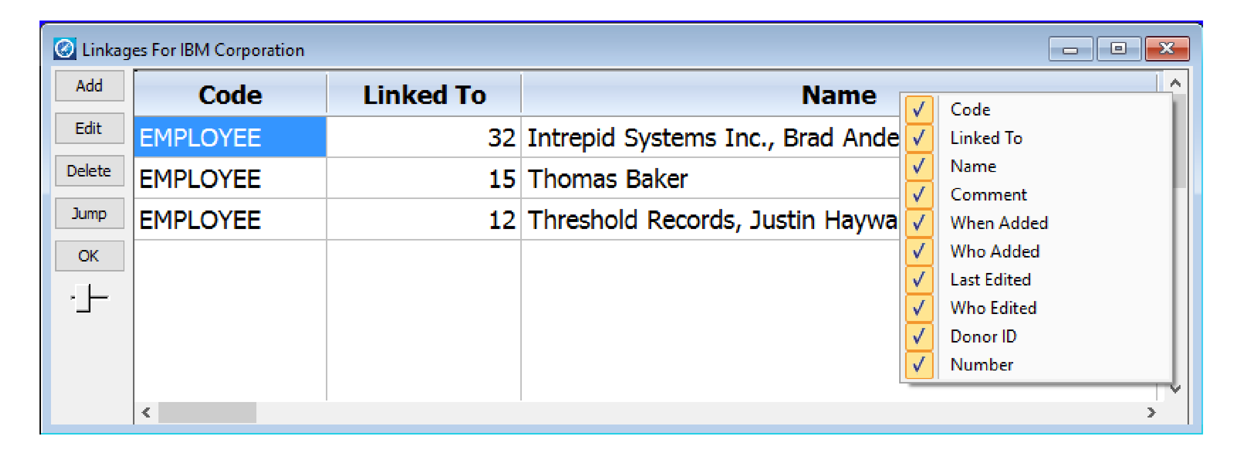
The Flex Find search field is always available at the top of the Main Information window, as shown here:



You may enter a search term in the Flex Find blank and click the Flex Find button to begin a search, or just press the Return key on your keyboard. You may also use the Tab and Shift-Tab key combinations to move between the Flex Find entry blank and the names of the Main Information data grid. To display all constituent names, leave the Flex Find search field blank and press Return.

Hiding Unneeded Columns

All of the data windows in DonorQuest will now remember which columns you wish to see. To turn on or off a column, position the mouse pointer within the title space for the columns on any data grid and do a right-mouse-click. You will see a pop-up menu which allows you to turn on or off display of any column in the window, like this:



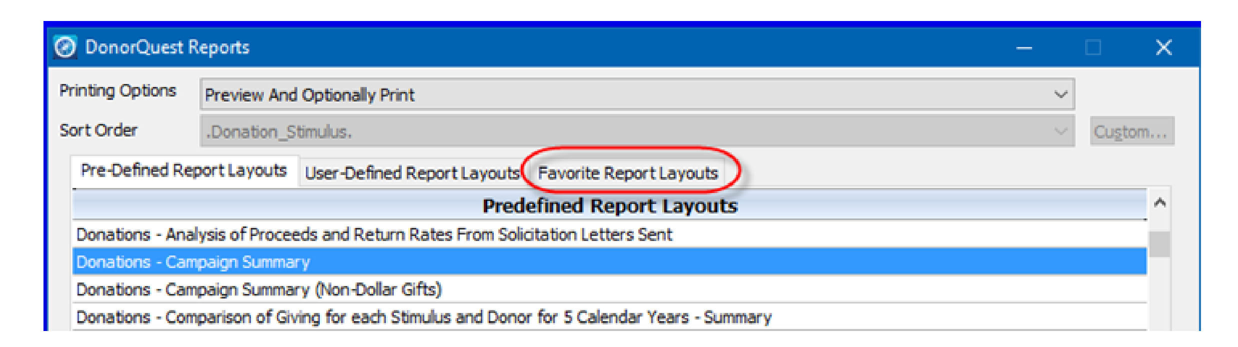
This pop-up menu was present in previous versions of DonorQuest, but the changes were never saved between sessions until now.

Display Of User-Defined Fields In Main Information Window

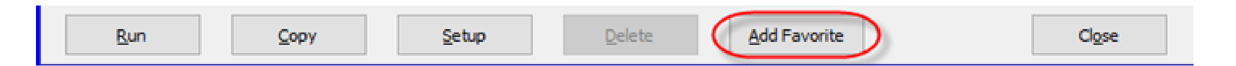
Previously, any user-defined fields you created under the Configure, Setup User-Defined Fields option in DonorQuest could only be viewed on-screen using the Main Information form. Now all user-defined fields also appear in the Main Information data grid. As with all built-in fields, columns with user-defined fields may be moved, resized, or hidden, and DonorQuest will remember your preferences between sessions.

Remembering Your Favorite Reports

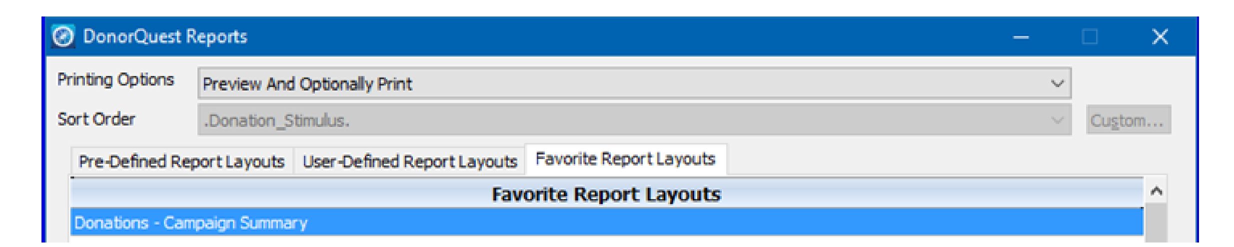
DonorQuest now allows you to maintain a personalized list of the reports you use most often, so that you can get to them quickly. The list is user-specific, so your report preferences will not interfere with those of other users. When the DonorQuest Report menu is open, you will see a new, "Favorite Report Layouts" tab, as shown here:



There is also a new, "Add Favorite" button at the bottom of the DonorQuest Reports dialog which will copy the currently highlighted report to your personal Favorite Report Layouts tab:

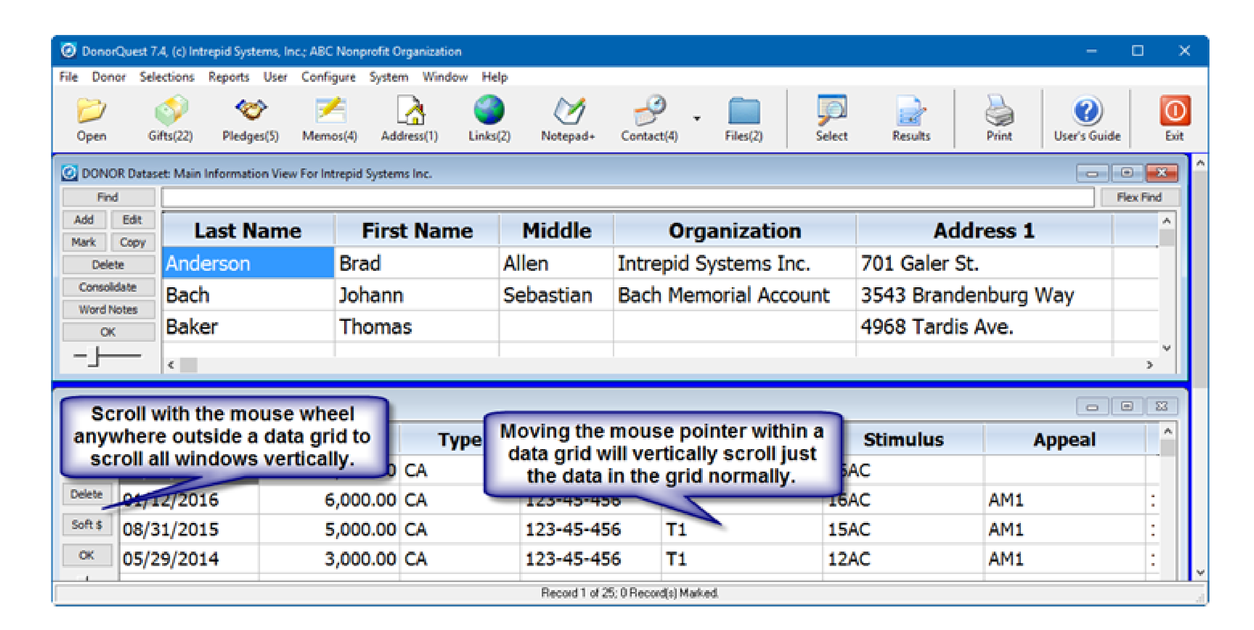


For example, clicking on the Add Favorites button when the, "Donations - Campaign Summary" report is highlighted on the Pre-Defined Report Layouts tab will add this report to your personal favorites tab like this:

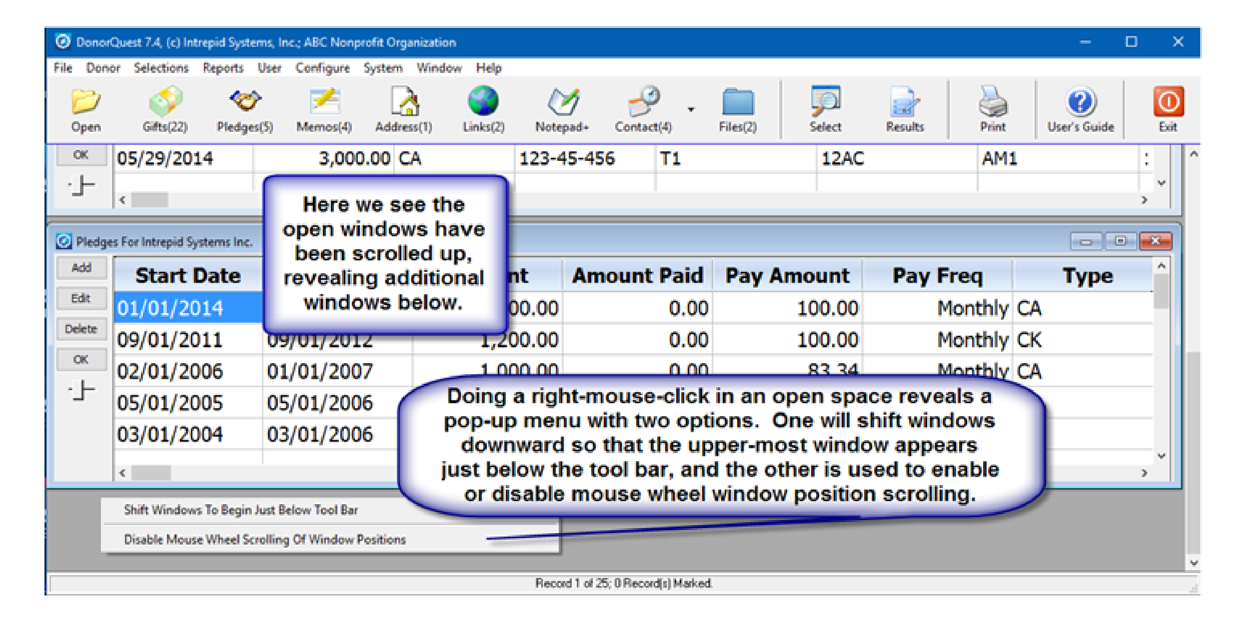


Scroll Bar Support In Main Application Window

DonorQuest now supports vertical and horizontal scroll bars in the main application window, which allow you to arrange multiple open windows in an area larger than your actual screen space, and quickly scroll or jump to any one of them. Mouse wheel support has also been added for scrolling all windows vertically within the main application window. Here’s how it works:



While the vertical scroll bars may be used in a traditional fashion to move all windows, the mouse wheel scrolling action is context-sensitive. When the mouse pointer is inside the scrollable data grid area of a specific window, only that data grid is scrolled. However, if the mouse pointer is outside of the scrollable area of a specific window, all windows are moved up or down.



Tile Vertically Maintaining Window Height

Clicking on the Window menu and choosing Tile Vertically Maintaining Window Heights will arrange all open windows vertically without changing their heights. They will extend into an "infinite" vertical space, accessed by scrolling, or clicking the corresponding tool bar icons to immediately jump to a specific window.

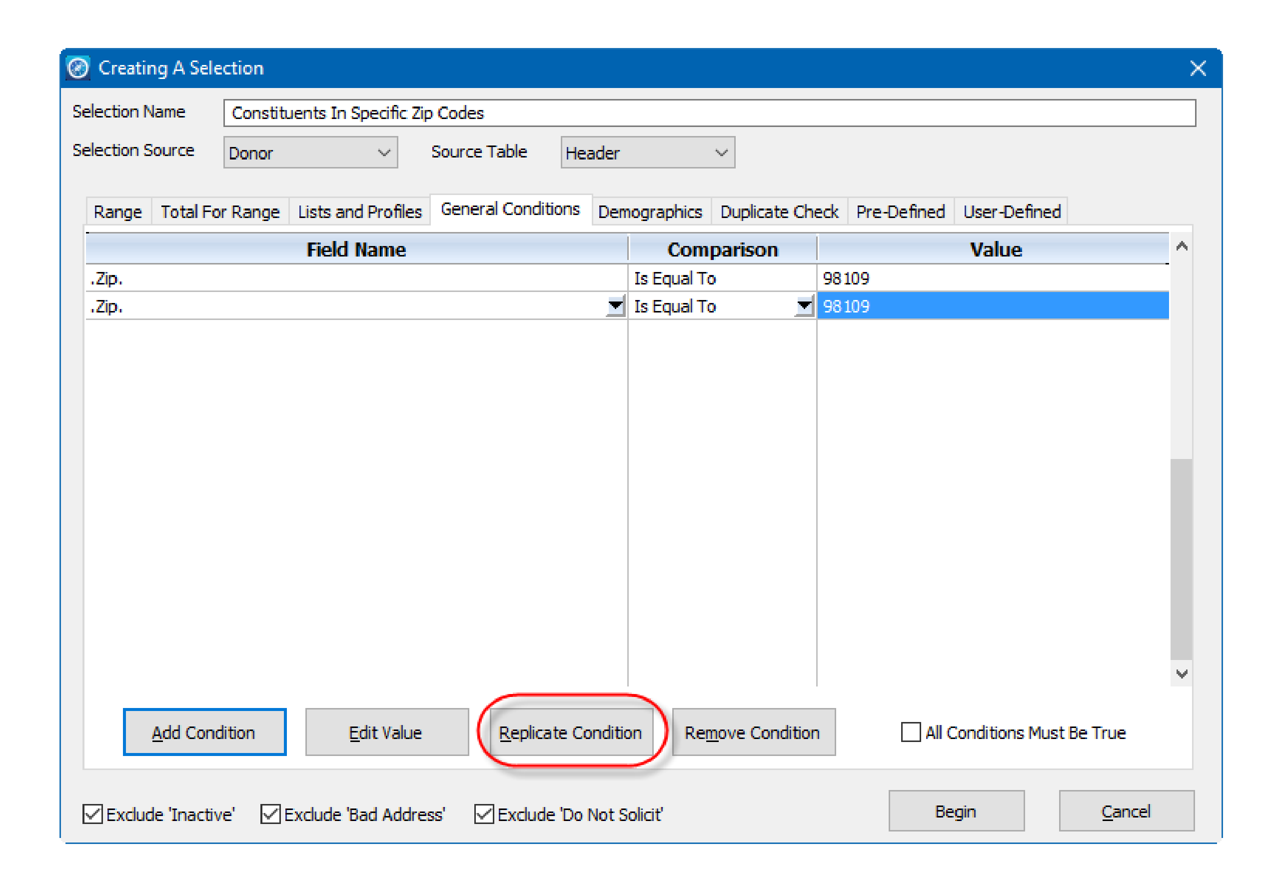
Tile Vertically Maintaining Horizontal Positions

Clicking on the Window menu and choosing Tile Vertically Maintaining Horizontal Positions is very similar to the above tiling option, but any custom horizontal placement of your windows will remain intact. So for example, if you have the Donations and Pledges windows positioned side-by-side, they will remain side-by-side, but will both be moved up or down to fill in any gaps which may exist between the windows above and below them.

Replicate Condition Button On General Conditions Tab

The General Conditions tab of the Creating A Selection dialog now has a new Replicate Condition button. This is useful when you have a lot of different values you wish to search for in the same field. For example, if you wish to find all of the constituents in a number of specific zip codes, you only have to choose the Zip field and Is Equal To comparison once, then use the Replicate Condition button to make lots of copies of what would be the same choices were you to use the drop-down menus repeatedly while adding a new condition. You have only then to double-click in the Value space to enter each specific zip codes you wish to select constituents for.

You may now also order the conditions of the General Conditions tab by clicking on the title of the Field Name, Comparison, or Value columns. When you have a long list of conditions, it is often helpful to order the list by Value, so you can quickly see if you have left out anything you need (such as a specific zip code in a long list of zip codes). Here's what the new dialog looks like:



Optional Database Encryption

DonorQuest is now capable of encrypting your entire database while still providing full multi-user access to it. The encryption is seamless, so that everything in DonorQuest works just as you would expect for all features. This adds a layer of protection for your sensitive donor data, making your data appear as unreadable gibberish to any would-be thieves which either hack into your main file server over the Internet, or perhaps even physically steal it from your office. Without knowing a DonorQuest User Name and Password, there is absolutely no way a hacker could decrypt your data if you are running DonorQuest with encryption on. To enable or disable encryption, from within DonorQuest click on Configure, Program Settings. You will find a checkbox there to encrypt your database. You may also uncheck the box to return to running in normal unencrypted mode. The only downside of running with encryption on is that it will slow DonorQuest performance slightly, but only by about 10% on average. The new performance enhancements in selections will typically more than make up for it.

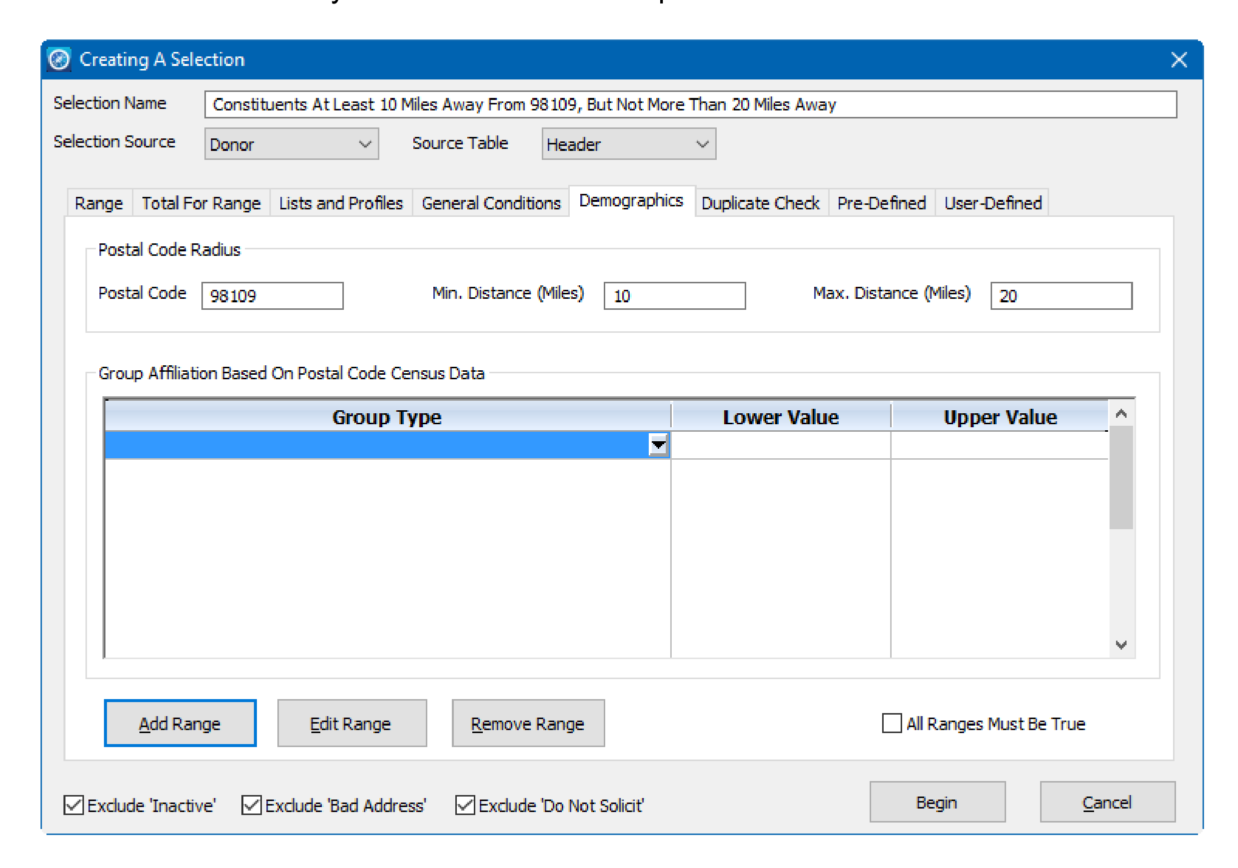
Selection Performance Enhanced

The DonorQuest selection process now uses high speed index files for certain key fields. If your selection references one of the key fields, DonorQuest will automatically optimize the selection so that only the records matching the condition you use for the key field will be processed. Previously, DonorQuest would need to sequentially process each record in the source table for each selection.

New Demographics Tab In Selections

The new Demographics selection tab in DonorQuest allows you to find constituents based on demographic information publicly available for the zip code in which the constituent lives. You can select constituents based on Zip Code Radius, Ethnicity, Age, Education Level, Median Household Income, Median Per Person Income, Average Home Value, etc. Since the demographic information is zip code based and statistical in nature, it does not violate a constituent's privacy.

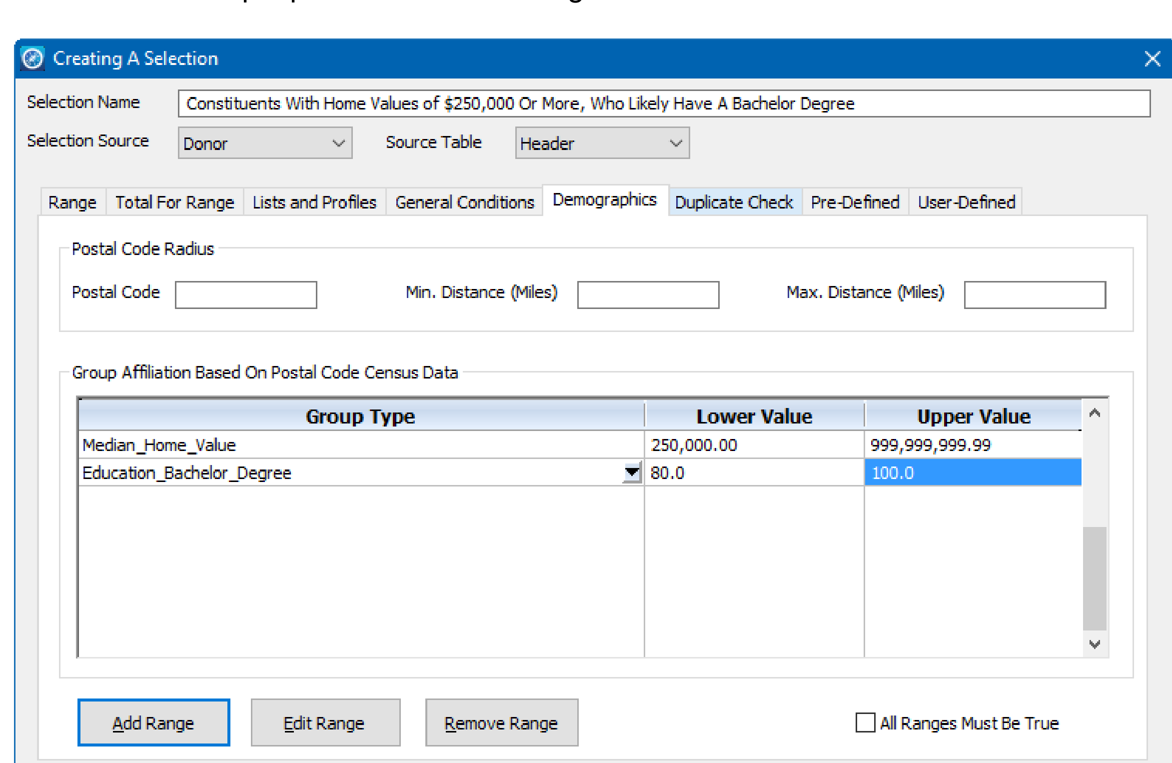
Here is an example of using the Demographics tab to find all of the constituents who live between ten and twenty miles from the center zip code of 98109:



You can think of the above selection as finding constituents in your database who live within a "ring" around a center zip code, with the inner circumference of the ring being 10 miles outside the center zip code, and the outer circumference of the ring being 20 miles outside the center zip code. This may of course be combined with any of the other selection tabs to ask questions such as, "Who has given $500 or more in the past six months, and lives within 15 miles of our main office?"

The Group Affiliation demographic conditions are expressed as ranges. The ranges will either be dollar amounts (for home values, median incomes, etc.) or percentages. When they are percentages, the percentage refers to the percentage of people within the constituent's zip code who have a particular attribute. Following is an example of how to select all the constituents with home values of $250,000 or more, who live in a zip code for

which 80% of the people have Bachelor Degrees:



Note that this is not a guarantee that the selected constituents have Bachelor Degrees, but there's an 80% chance they do based on the zip code they live in. Likewise, there is no guarantee the value of their home is $250,000 or more, but it is likely given the median home value for the zip code in which they live.

New Standard Reports Added

DonorQuest 7.4 includes the following new standard reports:

Donations - Count Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Grouped By 5-Digit Zip Code
Donations - Grouped By 5-Digit Zip Code - Summary
Header - Comparison Of Hard And Soft Year-To-Year Giving By Calendar Year
Header - Comparison Of Hard And Soft Year-To-Year Giving By Fiscal Year
Header - Constituent Name With Stored File List And Count
Pledges - Grouped By Fund

April, 2016

18.6 What Was New In DonorQuest 7.3

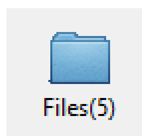
We had planned to release DonorQuest 7.3 next Spring, but as development proceeded more rapidly than expected, it became apparent that some really great new features were

ready, and there's no point in holding them back. So we decided to do a release now, with another still planned for next Spring. If you are upgrading from a version of DonorQuest earlier than 7.2 (the previous release), you should also consult the various "What's New..." documents, available on the DonorQuest website. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

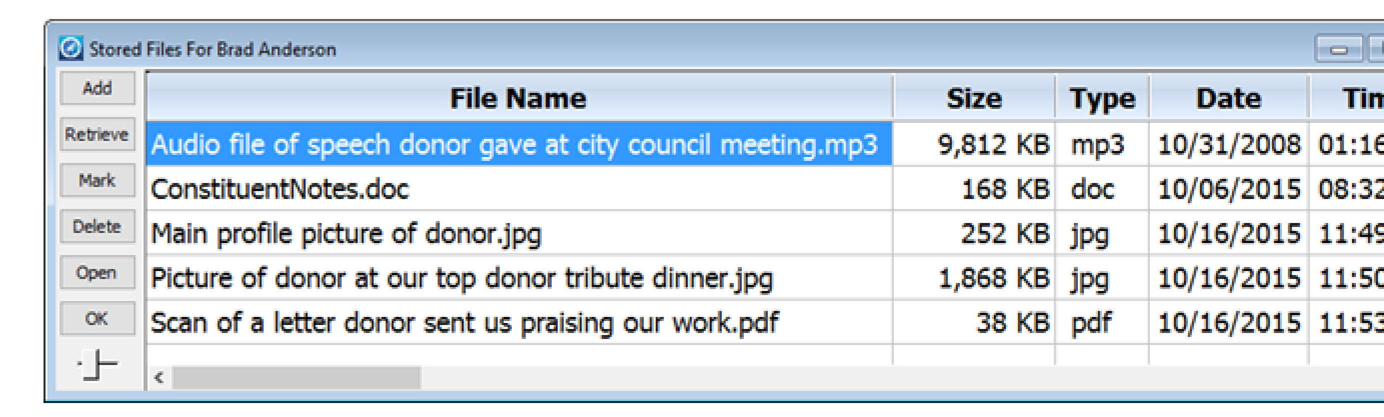
Here's an overview of the new features in DonorQuest 7.3:

Donor File Attachment

You may now store an unlimited number of files of any type (i.e. PDF, Word, Excel, Picture, Sound, Video, etc.) in each donor's record. The files are donor-specific and are shown in a standard DonorQuest data grid for each donor, just like donations, pledges, contacts, etc. Stored files may be opened in place by double-clicking on them. They may also be downloaded to any user's workstation, provided the user has the download access right turned on for their account in DonorQuest. There are five new user rights associated with stored files in DonorQuest - the ability to see the names of stored files, add to stored files, retrieve stored files, view/edit stored files in place (without having to extract and re-add them), and the right to delete stored files. There's a new blue folder icon on the DonorQuest toolbar for stored files which looks like this:



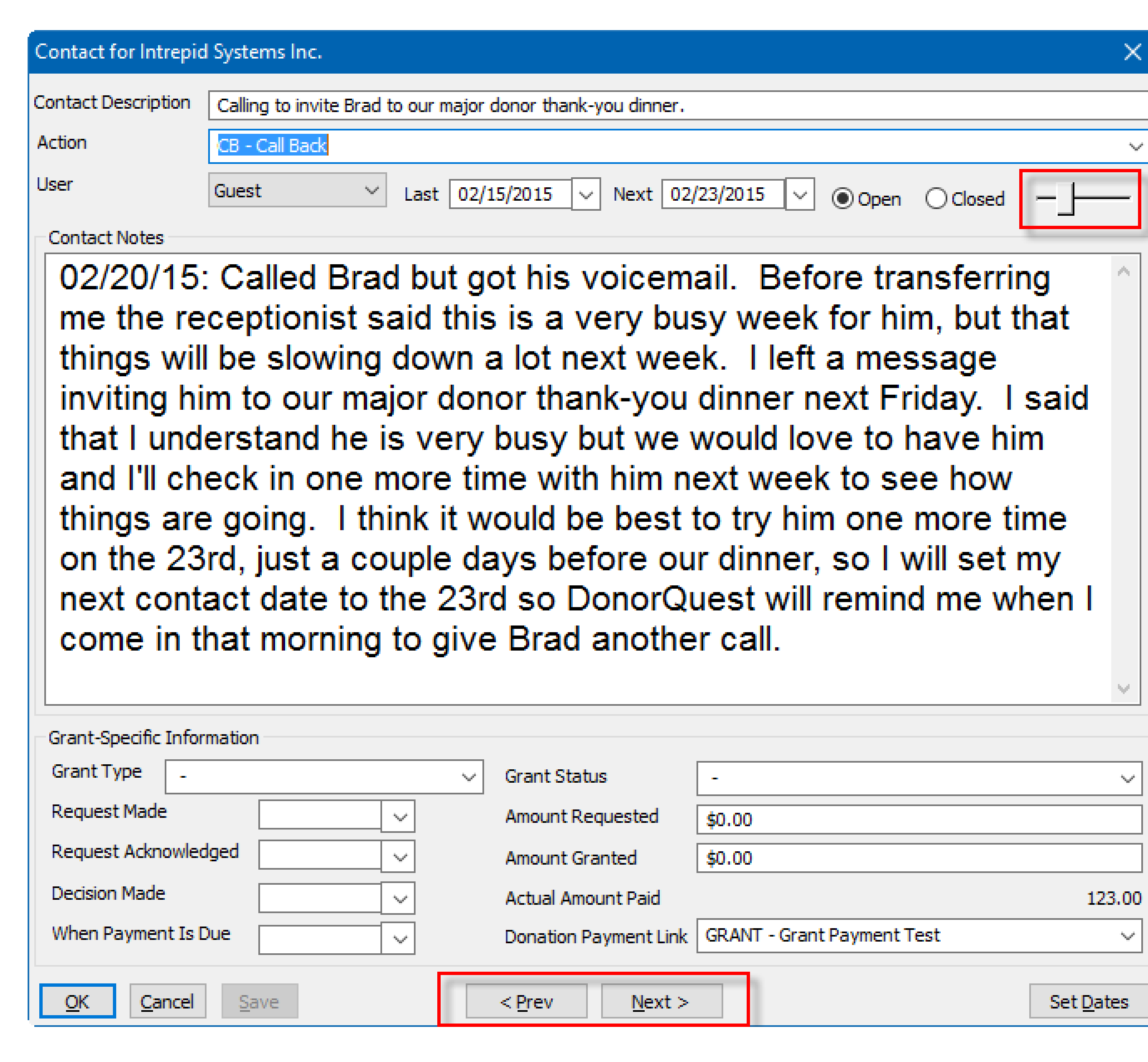
Just as the Donations icon shows the number of donations a donor has, the Files icon shows the number of stored files stored in each donor's account. This allows you to know at a glance whether there are any stored files for the current donor, even when Stored Files window is not visible. When you click on the Files icon, the Stored Files window will open, which looks like this:



Double-clicking a file name will open it in place. You may also use the Mark button to mark multiple files for retrieval to your workstation (or any folder you have access to), or for deletion, depending on how your user rights are set in DonorQuest.

Enhanced Contact Manager Form

Carrying forth from the major Contact Manager enhancements of 7.2, the contact form in DonorQuest 7.3 has been enlarged to have a much more generous space for entering contact notes, and includes a new horizontal slider control to change the font size of your contact notes. As with all DonorQuest windows, any preference changes you make are stored under your user account, so that DonorQuest can maintain your preferences from session to session with affecting other users. The new Contact Manager form looks like this:

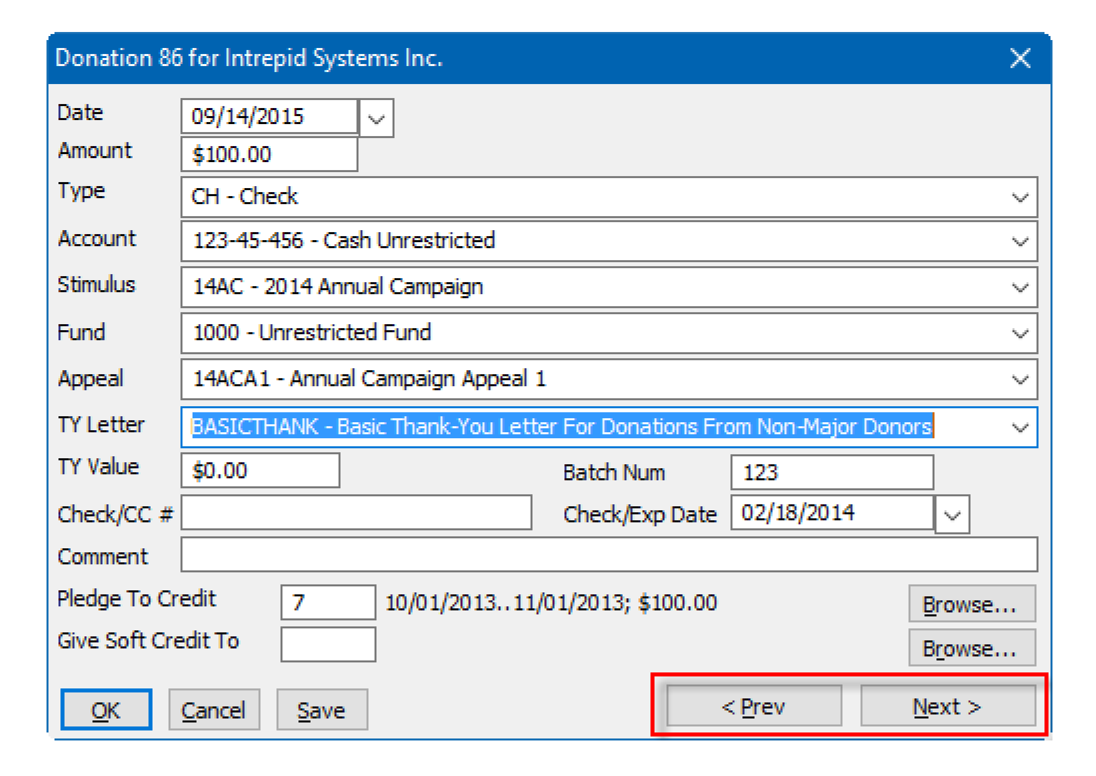


Notice the new horizontal scroll bar. There are also new Previous and Next navigation buttons, which will allow you to move between contact records without having to close the

contact form. These new buttons are especially handy when working your way through the day's contacts, as you would simply perform the donor interaction (making a call, sending an email, etc.), enter your notes, then click Save followed by Next. The navigation buttons are supported for every Contact view there is (i.e. all contacts for you, all contacts still open for you, all contacts for donor, all contacts for everyone), including any Contact-based selections you create.

Donation Form Navigation Buttons

Like the new Contact manager form, the donation form now has Previous and Next navigation buttons, which allow you to move between donation records while the donation form remains open. The new buttons are supported both when editing donations for the current donor, and when viewing the donations of a Selection Result. The donation form now looks like this:



The Previous and Next buttons also support keyboard shortcuts, so without having to take your hands off the keyboard, you can "press" the Previous and Next buttons with the Alt-P and Alt-N keyboard combinations (hold down the Alt key and type P or N). If you hold down the Alt-P or Alt-N combination continuously, DonorQuest will begin automatically scrolling through donations, refreshing both the form and the underlying donation data grid as it goes.

New Multi-Window View For Smaller Screens

DonorQuest 7.3 has a new display mode designed for smaller screens which still enables you to have multiple windows open (i.e. Donations, Pledges, Contacts, Stored Files, etc.),

with convenient access to each. To use this new display mode, first open all the windows you routinely use by clicking on the corresponding icon on the DonorQuest tool bar. For example, click the Donations icon, followed by the Contacts icon. Then click on the Window menu, and choose, Tile Vertically With Main Window Priority. This will create a split screen view with the main name/address grid taking up the top half of your screen, and all other windows set to the same half-screen size, but placed on top of each other on the lower half of your screen. Now, all you have to do is click the Donations or Contacts icons to switch between the Donation and Contact windows, with each window making optimal use of the available space on your screen when it is selected. In this mode, the toolbar icons effectively become tabs for the lower windows. You may also press the F6 key and the Shift-F6 key combination to move between open DonorQuest windows without having to take your hands off the keyboard.

Graphing A Donation-Based Selection

In DonorQuest 7.3 you may now graph any selection of donations using the standard DonorQuest donation graphs. The graphs in turn allow you to visualize both cumulative giving and gift counts by years, months, or weeks. Previously, you could only filter donations included in the graphs by the type of donation. Now, you may apply any possible filter condition you can think of by first running a selection to capture the donations you wish to graph. Then, click on the Selections menu and choose Donation Graphs From. For example, you could select all of the donations from individual givers and graph total revenue by year, then do the same for corporations and compare the two. If you have an annual campaign each year, you could select the donations for only your annual campaign for all years, then graph the result, seeing year-to-year revenue performance and gift counts for just your annual campaign.

New Standard Reports Added

DonorQuest 7.3 includes the following new standard reports:

Donations - Count Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Grouped By 5-Digit Zip Code
Donations - Grouped By 5-Digit Zip Code - Summary
Header - Comparison Of Hard And Soft Year-To-Year Giving By Calendar Year
Header - Comparison Of Hard And Soft Year-To-Year Giving By Fiscal Year
Header - Constituent Name With Stored File List And Count
Pledges - Grouped By Fund

October, 2015

18.7 What Was New In DonorQuest 7.2

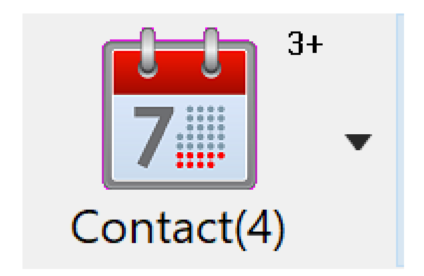
DonorQuest 7.2 is a significant upgrade, incorporating many requested features, including a new type of statistical reporting called Donor Metrics. If you are coming from a version of

DonorQuest earlier than 7.12 (the previous release), you should also consult the various "What's New..." documents, available on the DonorQuest website. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

Here's an overview of the new features in DonorQuest 7.2:

New Indicators On Contacts Button

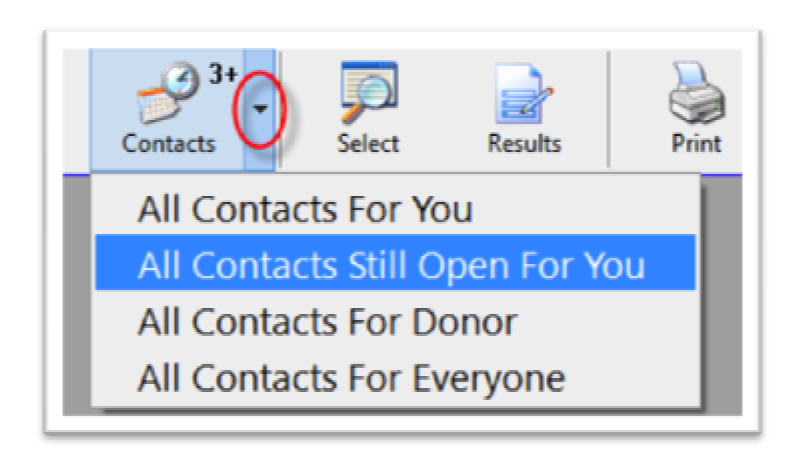
DonorQuest now takes Constituency Relationship Management to the next level of convenience! The scheduled Contacts button on the DonorQuest Tool Bar has been enhanced to show the number of open contacts you have scheduled for today. While DonorQuest will still remind you when you log in of how many open contacts you have for today and how many open contacts from the past there are which still need attention, it's easy to forget that one reminder as you begin a busy day. If you have enabled contact reminders in your personal settings, the new indicators are always present. They are much like the reminder on an email icon that you have unread email. For example, if you have three open contacts which need attention today, the contacts button will look like this:



If a plus (+) symbol is also present, that indicates that you have one or more open contacts from the past which still need attention.

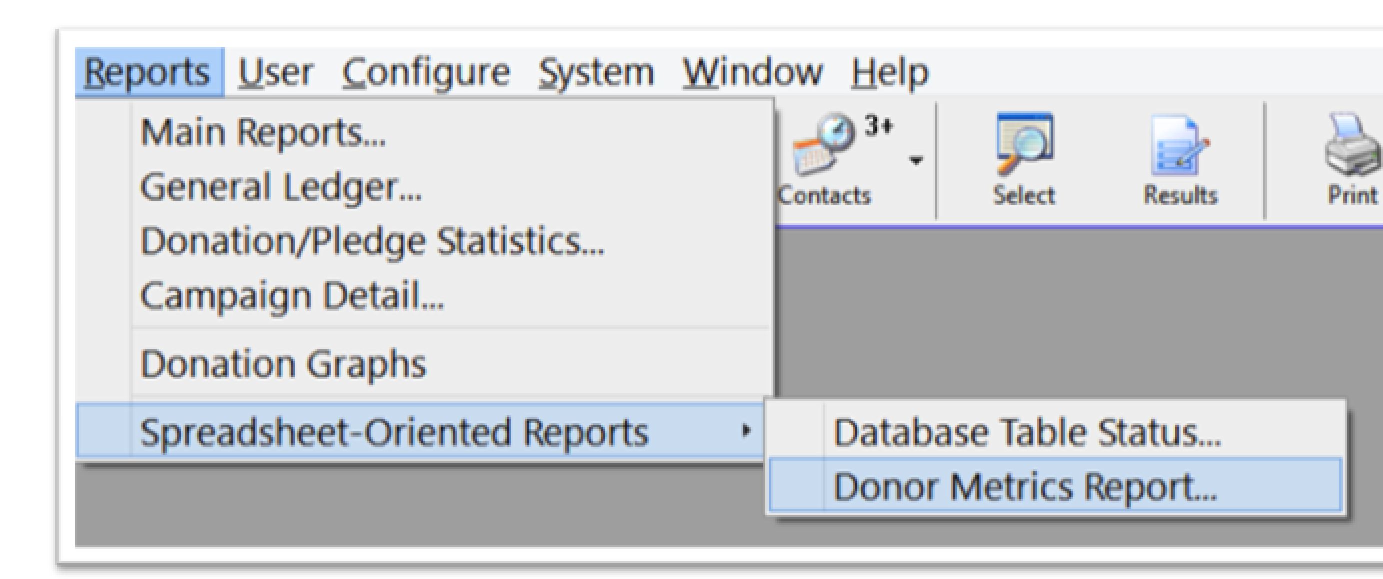
New View Menu For Contacts Button

The scheduled Contacts button now also features a pop-up menu of options to allow you quick access to the different ways of seeing your contacts. These options are also still available on the main Donor, Scheduled Contacts / Grant Tracking menu, but they are a lot easier to get to now being integrated with the contacts button. Simply click on the down pointing arrow on the right side of the Contacts icon to launch the contacts view menu. This is how it looks in Windows 10:



New Reports Menu

The new DonorQuest Reports menu ushers in a new type of reporting in DonorQuest designed to do in-depth analysis of donor giving. Due to the many columns these reports typically have, their output is displayed in a DonorQuest datagrid, which may then be sent directly to an actual spreadsheet for further analysis. This menu also serves as the new home for some of the existing specialized DonorQuest reporting options previously spread across multiple menus, including the General Ledger, Donation/Pledge Statistics, Campaign Detail, and Donation Graphs. Here is what the new reports menu looks like:



The Database Table Status option will show you a broad overview of your entire database. The Main Reports option will close all open windows and active the standard DonorQuest reports menu you are used to seeing, but it will do so directly, allowing each report to be run outside of a Selection filter, and independently of any records you may have marked in the Main Information window. Both the tool bar Print icon and the File, Print/Setup A Report menu retain their previous functionality of deferring to any highlighted Selection Result or Main Information record. Note that the above example is also illustrating the new ability in

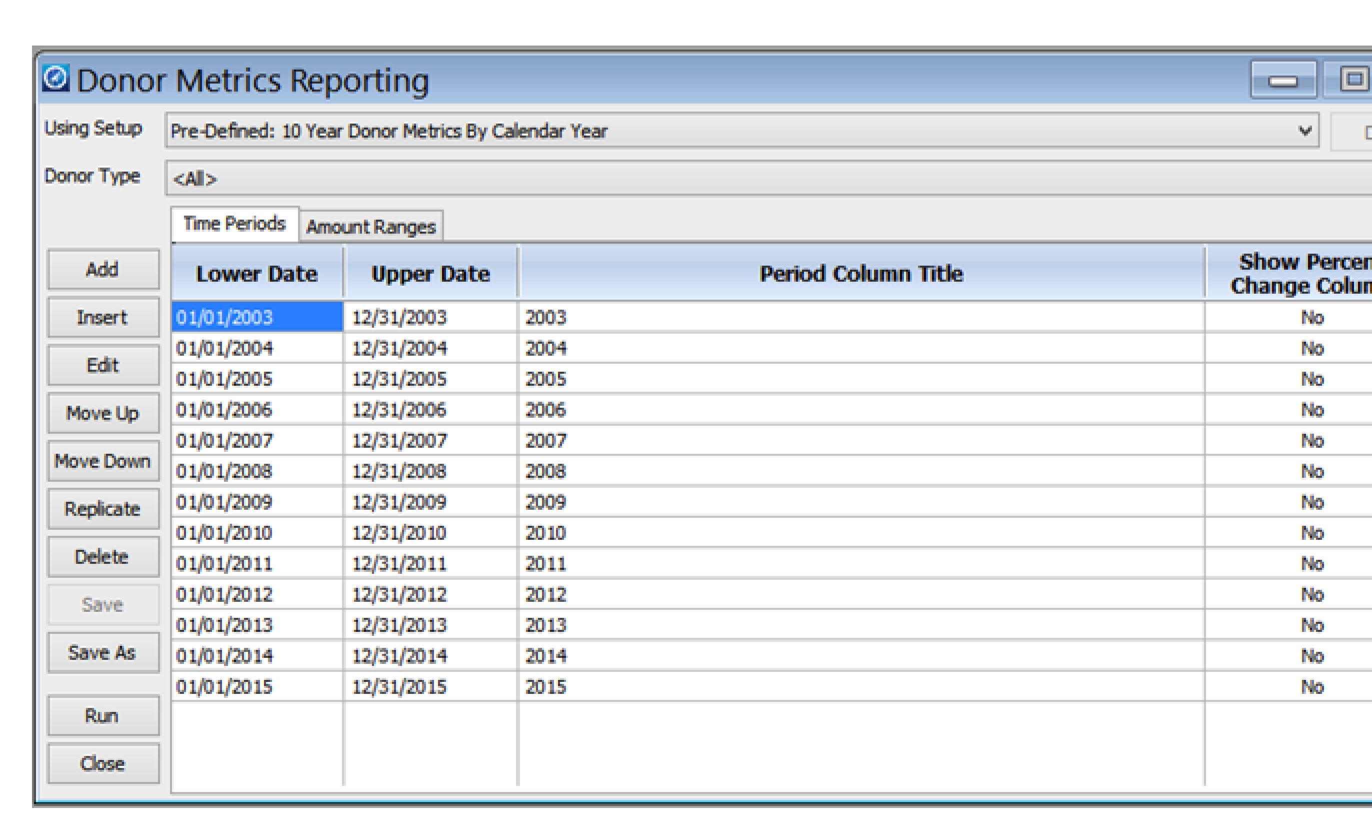
Windows 10 to customize the font size in program menus, which DonorQuest fully supports.

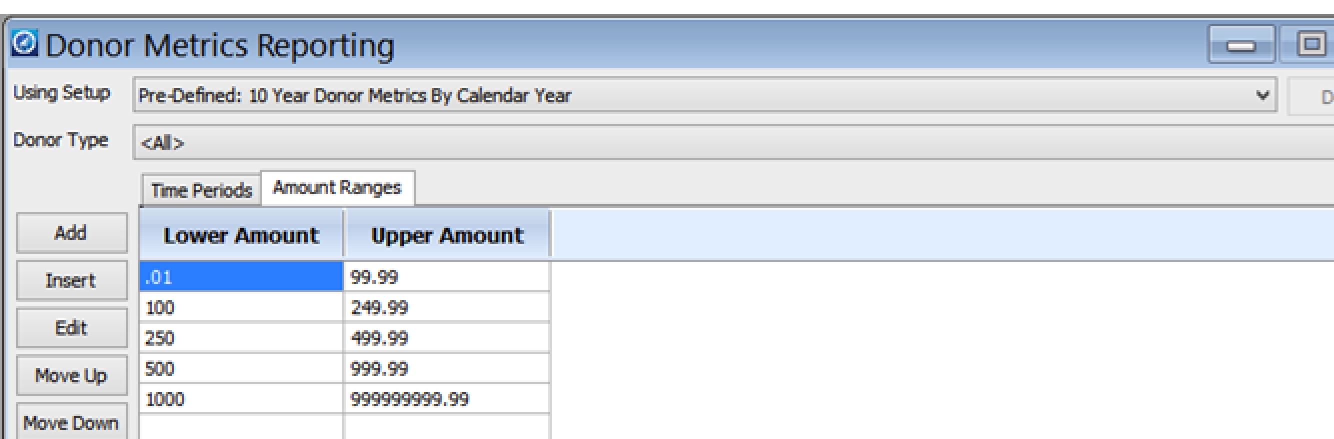
Donor Metrics Reporting

The new Donor Metrics reporting is the first of this new breed of DonorQuest reporting. Essentially, it allows you to compare statistical changes in donor giving behavior between multiple time periods. The metrics shown are Total Number of Donors, Number of New Donors, Number of Repeat Donors, Total Number of Donations, Dollar Total of Donations, Average Donation Amount, and Average Number of Gifts Per Donor. In addition to these metrics being shown in total for each period, the same metrics are also shown broken down by donation amount range. All aspects of the report are customizable, including the specific time periods compared, and the specific donation amount ranges shown. There are currently twelve predefined setups for the report, all of which can be copied and customized. The predefined setups included are:

10 Year Donor Metrics By Calendar Year
10 Year Donor Metrics By Calendar Year With Year-To-Year Percentage Change
10 Year Donor Metrics By Fiscal Year
10 Year Donor Metrics By Fiscal Year With Year-To-Year Percentage Change
Q1 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q2 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q3 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q4 Comparison Of Monthly Revenue, Current And Previous Calendar Year
Q1 Comparison Of Monthly Revenue, Current And Previous Fiscal Year
Q2 Comparison Of Monthly Revenue, Current And Previous Fiscal Year
Q3 Comparison Of Monthly Revenue, Current And Previous Fiscal Year
Q4 Comparison Of Monthly Revenue, Current And Previous Fiscal Year

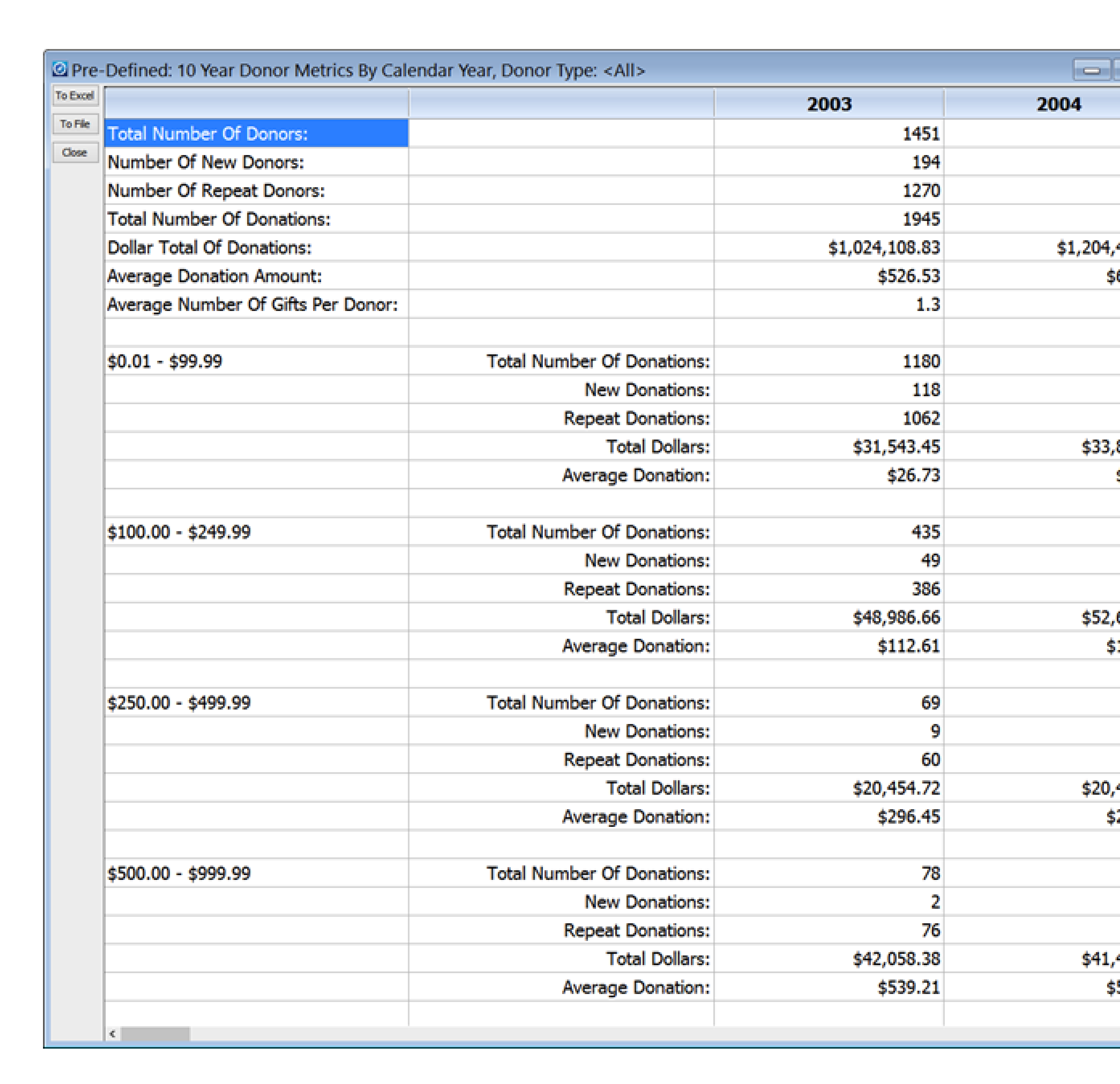
Here is what the Donor Metrics reporting interface looks like:





The Setup drop-down allows you to choose from among the predefined setups, and any setups which you create. For example, you could modify any of the date or amount ranges in one of the predefined setups, then click on the Save button to create a new custom setup. These date and amount ranges determine the actual columns and rows of the report. The donations included can be additionally filtered by a specific Donor Type chosen directly on the Donor Metrics main dialog, or you can even drive a Donor Metrics session with a donation-based Selection Result to filter donations based on absolutely any condition you can think of.

Here is what running the Donor Metrics report with the, "10 Year Donor Metrics By Calendar Year" setting on a typical donor database looks like:



		2003	2004
Total Number Of Donors:		1451	
Number Of New Donors:		194	
Number Of Repeat Donors:		1270	
Total Number Of Donations:		1945	
Dollar Total Of Donations:		$1,024,108.83	$1,204,4
Average Donation Amount:		$526.53	$6
Average Number Of Gifts Per Donor:		1.3	
$0.01 - $99.99	Total Number Of Donations:	1180	
	New Donations:	118	
	Repeat Donations:	1062	
	Total Dollars:	$31,543.45	$33,8
	Average Donation:	$26.73	$
$100.00 - $249.99	Total Number Of Donations:	435	
	New Donations:	49	
	Repeat Donations:	386	
	Total Dollars:	$48,986.66	$52,6
	Average Donation:	$112.61	$1
$250.00 - $499.99	Total Number Of Donations:	69	
	New Donations:	9	
	Repeat Donations:	60	
	Total Dollars:	$20,454.72	$20,4
	Average Donation:	$296.45	$2
$500.00 - $999.99	Total Number Of Donations:	78	
	New Donations:	2	
	Repeat Donations:	76	
	Total Dollars:	$42,058.38	$41,4
	Average Donation:	$539.21	$5

The above image only shows the first two years of the report, but of course the full report shows all years 2003 through 2015. The predefined reporting options also automatically adjust themselves as the years go by, so when run in calendar 2016, the above report would automatically begin with 2004 and end with 2016.

Selection Mark Menu Expanded

The Selections Mark/Unmark menu has been expanded with two new options - Mark All With Dependencies, and Mark All With No Dependencies. Selections have dependencies on other selections whenever you mark and combine multiple selections to form a final result. That final result depends on the older results used to create it. In the past these

dependencies would make cleaning up old selections difficult, since DonorQuest will not let you delete a selection upon which another depends, since the older selection is still needed when refreshing any newer dependent selections. Now DonorQuest will do the work for you of hunting down these "final result" selections built from others, so they may be deleted first, which then frees the component selections for deletion. The option for marking all selection results with no dependencies also makes quick work of mass deleting older independent selections you no longer need.

Your Organization's Name On Reports

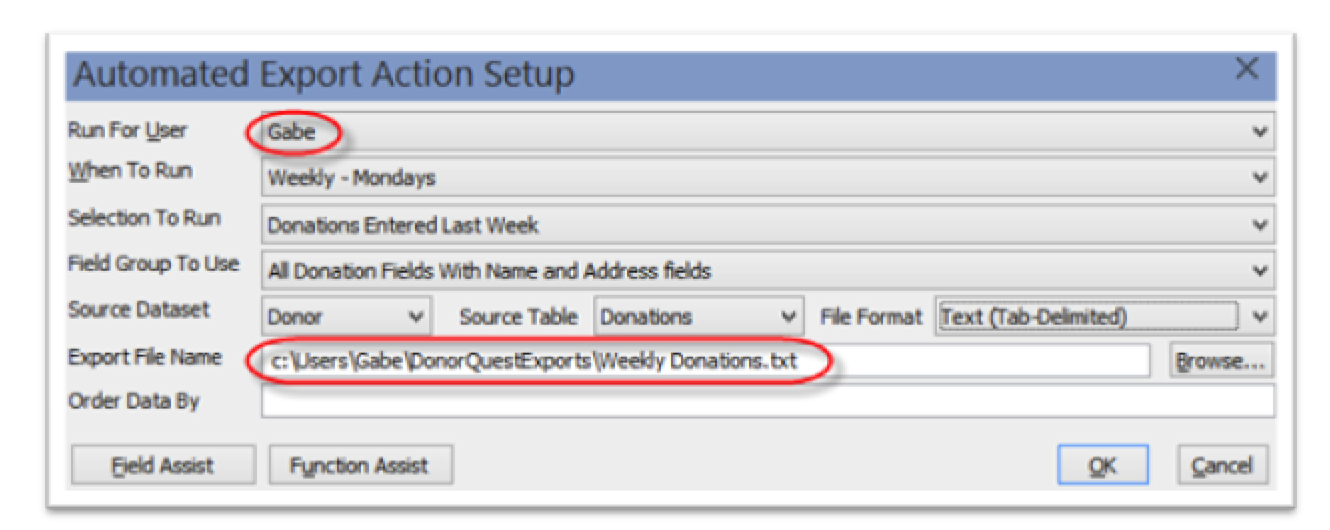
The Program Settings dialog now has a new option for including your organization's name on all DonorQuest reports which contain a standard report heading. Click on Configure, Program Settings to access this dialog. The name you entered for your organization under Configure, Your Organization's Information is used for this purpose, so check there to be sure your organization name is entered correctly.

Auto-Fill On Donation/Pledge Payment Linking

Now when you apply a donation as a payment to an existing pledge, the Donation Type, Account, Stimulus, Fund, and Appeal codes will be automatically filled in for you from the pledge to which you are linking the donation as a payment. Of course this is only done for blank donation fields - any codes you may have already entered before linking the donation are kept as you entered them.

User-Specific Auto-Exports

The ability of DonorQuest to automatically query and export data at specific time intervals has been enhanced so that now the exports can be user-specific. When you click on Configure, Setup Auto-Exports, and add or edit an export action, you can specify a user for the export action like this:



In the above example, the automated weekly export of all donations entered last week is only done when user Gabe is logged into DonorQuest. This is important because the export path refers to a folder on user Gabe's actual computer, which is only accessible when Gabe is using DonorQuest from his computer. The Browse button next to the Export File Name shown above is also new in DonorQuest 7.2.

Duplicate Check For Donations, Pledges, Etc.

DonorQuest has long had the ability to check for duplicate donors based on any combination of constituency fields (last name, organization name, address, email, phone, etc.). Now DonorQuest can also check for any duplicate donations based on any combination of donation fields including date, amount, stimulus, appeal, etc. This can come in handle if you accidentally imported the same batch of donations twice. Now you can select and mass delete the duplicates. This also applies to pledges, memos, contacts, etc. Additionally, you may search for duplicate donations across the entire database, or just within donor accounts.

Zip Code Table May Now Be Edited

DonorQuest speeds data entry by auto-filling the city, state, and county for you when you enter the zip code for a new donor and press the tab key. DonorQuest uses an internal zip code table (provided by the USPS) to accomplish this. On the rare occasion a city, state, zip, and county combination is not known to DonorQuest, you can optionally add the new combination so that DonorQuest will recognize it for future entries. Up until now, it was not possible to correct an invalid combination you mistakenly added, but now you may click on File, Open, The Postal Table to gain full access to DonorQuest's internal zip code table. You may correct or delete entries you have made, and all of your custom city, state, zip, county combinations will also now be preserved even as the predefined combinations are updated during periodic DonorQuest upgrades.
Support For Windows 7, 8, and 10 Personalization
Windows versions 7 through 10 have advanced personalization options which allow you to adjust the appearance of program dialogs. In particular, you can make dialog controls larger or smaller to suite your taste, and the change will apply to all programs. DonorQuest 7.2 in now fully compatible with such changes, allowing you to customize at will without causing any control alignment issues for DonorQuest. Also, the new look for the Windows 10 desktop is using color very sparingly, so if you would like DonorQuest to blend in more with that you can click on User, Change Your Personal Settings, and set you're Background color to be Classic Grey. This is a personal setting so it will not affect other DonorQuest users. When Apple and Microsoft decide color is cool again, you can always switch it back. Oh and for those of you who still prefer the much loved and amazingly efficient Windows XP, fear not. DonorQuest is still fully XP-compatible.

New Standard Reports Added

DonorQuest 7.2 includes the following new standard reports:

Donations - Grouped By Donor And Fund - Summary
Header - Count Of Counties And States With Percentages

Donations - Count Of Gifts In Dollar Ranges By Calendar Year And Week
Donations - Donation Detail Report With Aggregated Soft Credit Donations
Donations - Count And Total Of Donations By Giving Entity With Percentages
Donations - Grouped By Account, Subtotalled by Stimulus, Totals Only
Donations - Comparison Of Year-To-Year Giving By Fiscal Year With Totals
Donations - Address Info And Aggregated Hard And Soft Credit Donation Total
Donations - Count Of Gifts In Dollar Ranges By Calendar Year
Donations - Count Of Gifts In Dollar Ranges By Fiscal Year
Donations - Count Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Total Of Gifts In Dollar Ranges By Fiscal Year
Donations - Total Of Gifts In Dollar Ranges By Calendar Year
Donations - Total Of Gifts In Dollar Ranges By Calendar Year And Week
Donations - Total Of Gifts In Dollar Ranges By Fiscal Year And Week
Donations - Donor Name, Phone, Donation Amount And Stimulus
Contacts - User Counts
Donations - Grouped By Fund - Summary With Donation And Donor Counts

Want Some Freedom From The Office?

Then the cloud version of DonorQuest might be right for your organization. It has the same look and feel as the installed version of DonorQuest you currently have so there is no learning curve, just a lot of freedom - the freedom to securely access your donor database from anywhere you are on any device including Apple Macs, iPads, iPhones, Traditional Windows PC's, and even Google Chromebooks. Oh and did we mention it's fast - very fast. It runs in a huge datacenter with multiple physical servers all on tap to get those Selections and Reports run before you can even reach for your cup of coffee, no matter how many donor records you have.

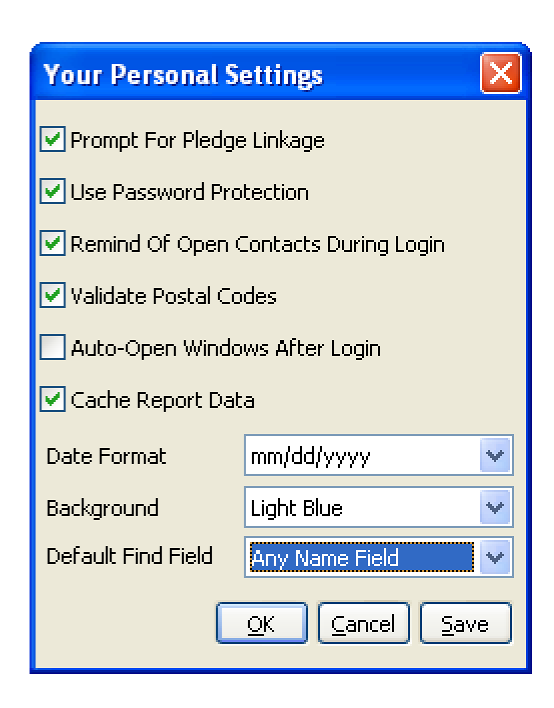
March, 2015

18.8 What Was New In DonorQuest 7.1.2

DonorQuest 7.1.2 is a maintenance release of DonorQuest, so it focuses mainly on correcting any problems reported with the previous release. However, it also brings with it a few nice enhancements and performance fine tunings.

Ability To Set Default Find Field

Normally when using the Find feature of the Main Information Window, the cursor defaults to starting in the, “Any Name Field” blank. However, some users may search by ID or Telephone number more often. You may now set DonorQuest to position the entry cursor of the Find dialog to any of the fourteen search fields by default. This setting is user-specific, so it will have no impact on the settings chosen by other users. To set the default control for your account, click on User, Change Your Personal Settings. You will see a dialog similar to this:



Simply click on the drop-down for Default Find Field and make your selection, then click Ok.

Auto Update Of Salutation Fields

The salutation fields are very important in DonorQuest, as they are always used on correspondence with the donor. DonorQuest has long auto-populated Salutation 1 and Salutation 2 for you automatically when one or more of the Salutation fields are blank and you are saving changes to the primary and or secondary name fields. However, if the Salutation fields are not blank, in past versions DonorQuest would simply leave them as is, even if a change was made to the primary or secondary name fields which could possibly invalidate what's already in the Salutation fields. Now when you make any changes to the primary or secondary name fields for a donor, DonorQuest 7.12 will ask if it is ok to automatically update the Salutation fields. Even if you choose to update them manually, this automatic message servers as a reminder to do so. Note that the, “Auto-Fill Blank Salutations On Record Save” option must be checked on under Configure, Program Settings for this behavior.

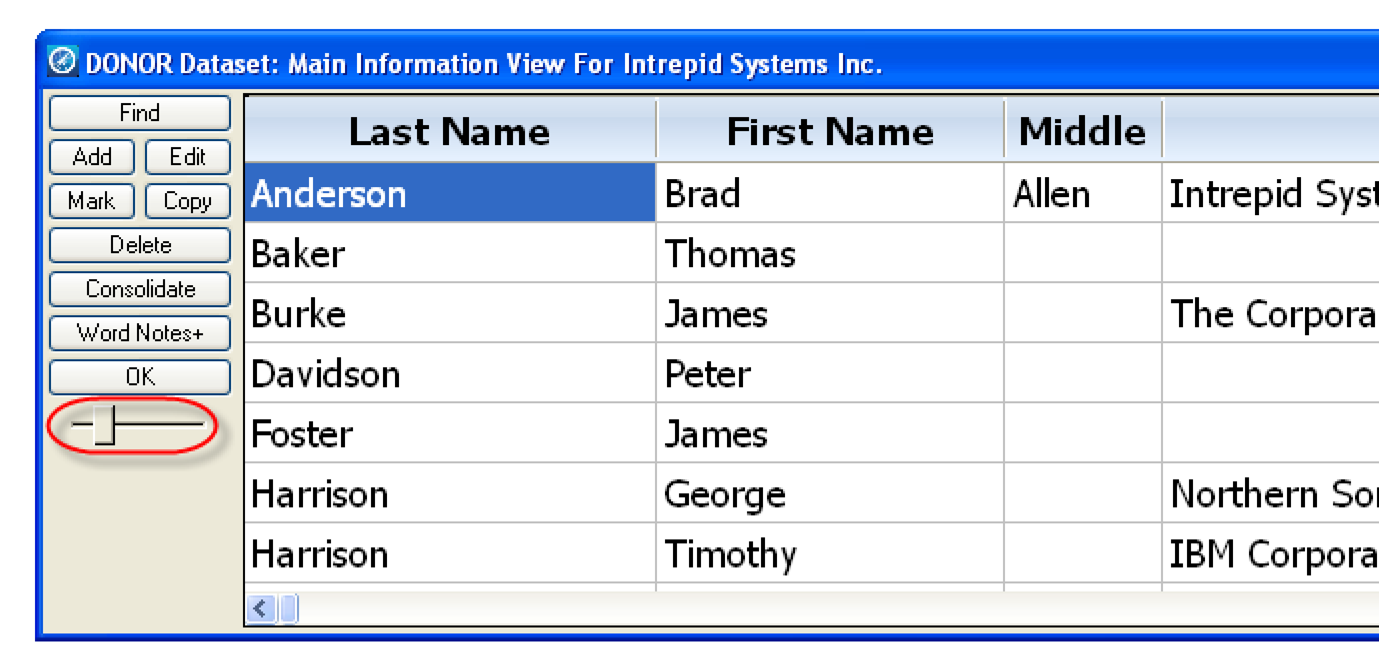
View Option For Import Log

DonorQuest has long maintained a data import log which contains detailed decisions DonorQuest makes about each imported record whenever you perform a data import. This import log is stored in a simple text file in your \Dquest\ folder. As a convenience, DonorQuest 7.12 now allows easy viewing of this file by clicking on File, Open, The Import Log.

Dynamic Font Size Adjustment Slider Control In

Data Grids

All of the Main Information display grids now have a slider bar which allows you to dynamically adjust the size of the display font within the window, similar to the slider found in Word and Excel. This is especially handy on large high resolution displays:



As with all other window settings in DonorQuest, any changes you make are specific to your DonorQuest user account, so they will not affect the preferences of other users. Note that this feature was also available for a limited release of DonorQuest 7.1, but it is now standard in DonorQuest 7.12 and later.

Updated Internal Zip Code Table

As with all updates, this release of DonorQuest also has an updated internal zip code table which contains all the City, State, Counties, and 5-digit zip code combinations in the United States. This is used to support the auto-entry of city, state, and county for you when adding a new donor. Remember, to use this feature, all you have to do is enter the zip code for a new donor and press the Tab key. Leave the city, state, and county fields blank, as they will be filled in for you automatically when you Tab out of the zip code field. This updated internal table also supports the System, Auto-Fill Empty Salutation And County Fields option. This feature searches your entire database, automatically filling in any missing Salutation and County fields.

February, 2014

18.9 What Was New In DonorQuest 7.1

DonorQuest 7.1 brings a number of enhancements, including an often asked for feature – the ability to print reports directly to Excel and Word, as well as to a PDF, TXT, or CSV file.

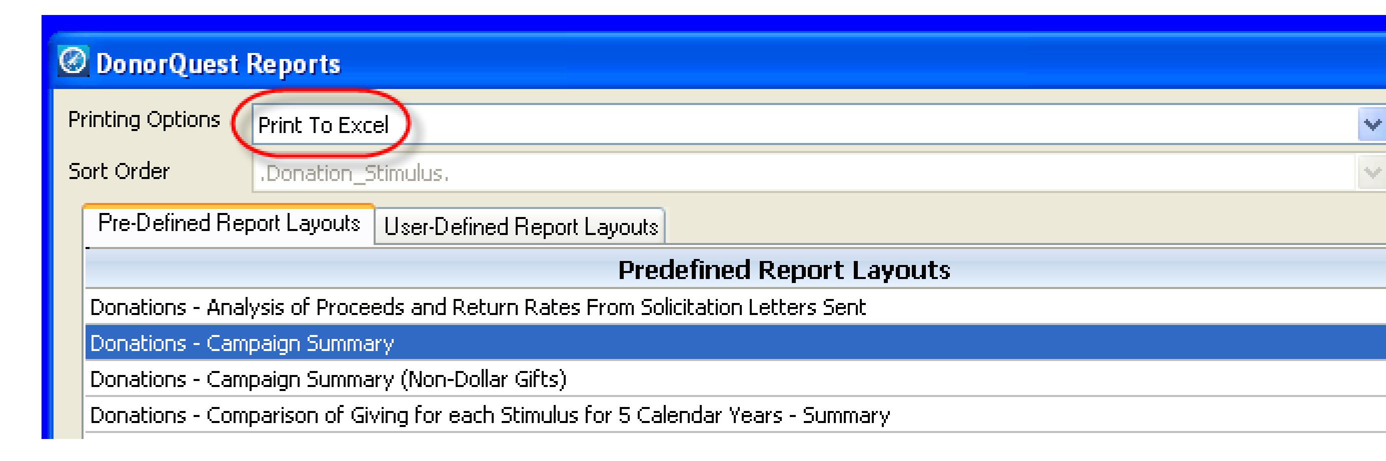
In previous versions of DonorQuest, raw data could be exported directly to Excel, but not the very useful totals and computed values of the 400+ DonorQuest stock report layouts (as well as any user-defined report layouts you may have created). There have also been performance enhancements to the reporting engine, allowing reports to begin printing almost immediately, even on a slow network.

If you are coming from a version of DonorQuest earlier than 7.02 (the previous release), you should also consult the various "What's New..." documents, available on the DonorQuest website at: www.donorquest.com From the home page, click on Support, then click Downloads. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

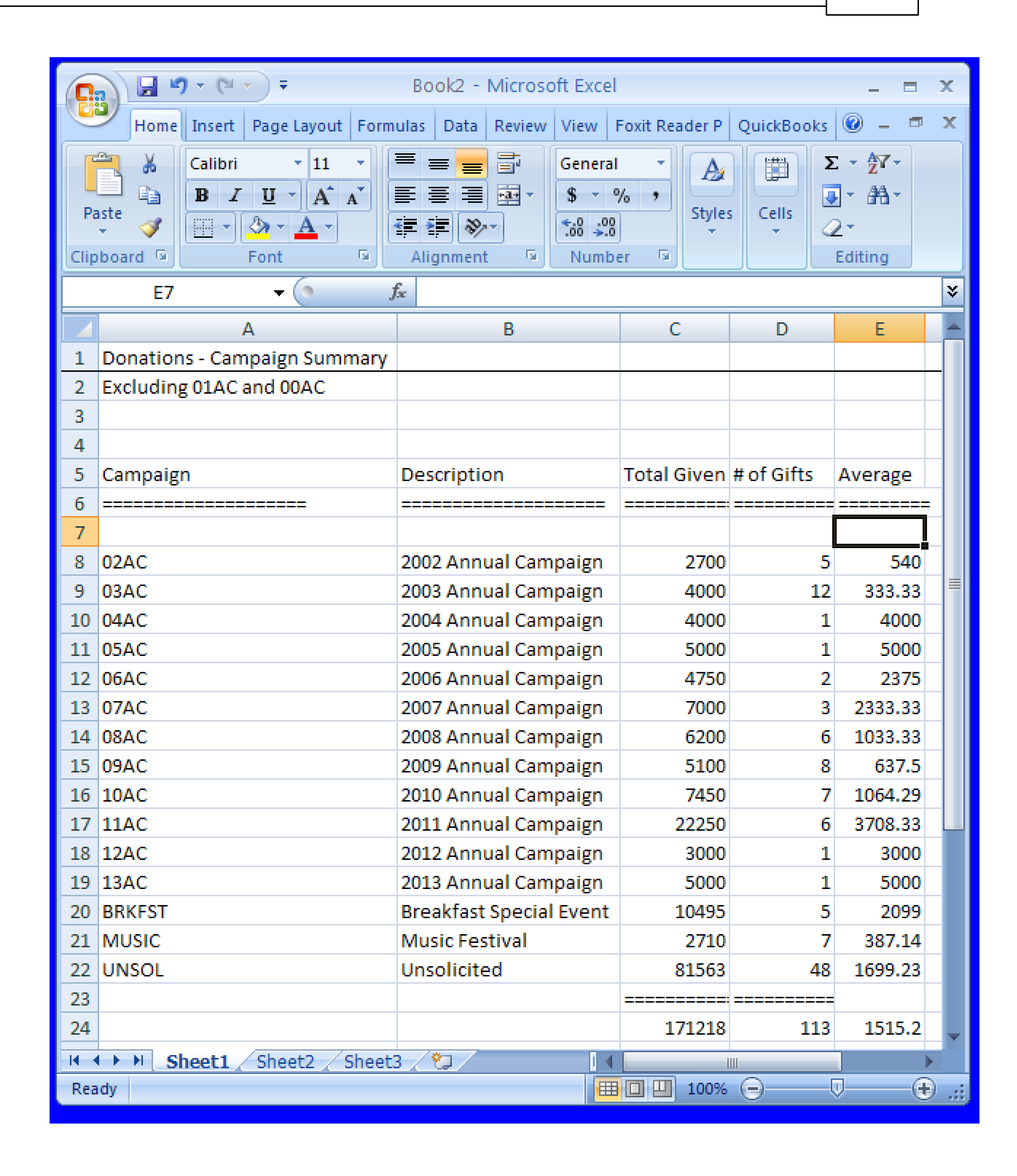
Here are some details about the new features of DonorQuest 7.1:

Printing DonorQuest Reports Directly To Excel

Now when printing any DonorQuest report, you can select the, “Print To Excel” option from the Printing Options drop-down box:

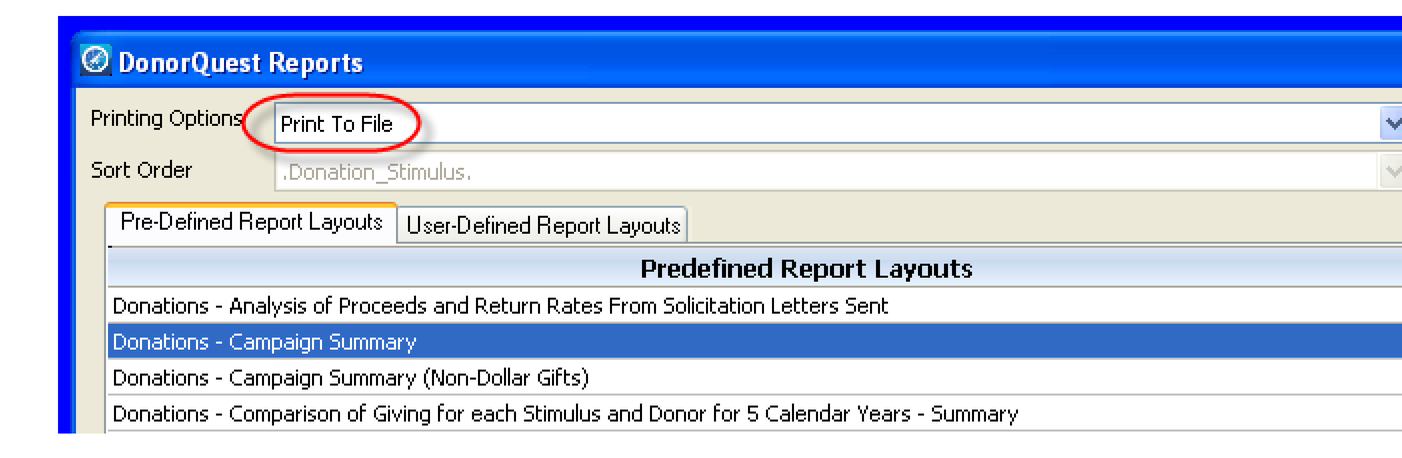


This will result in Excel being opened automatically, and a new Excel sheet being populated with the contents of the selected report, like this:



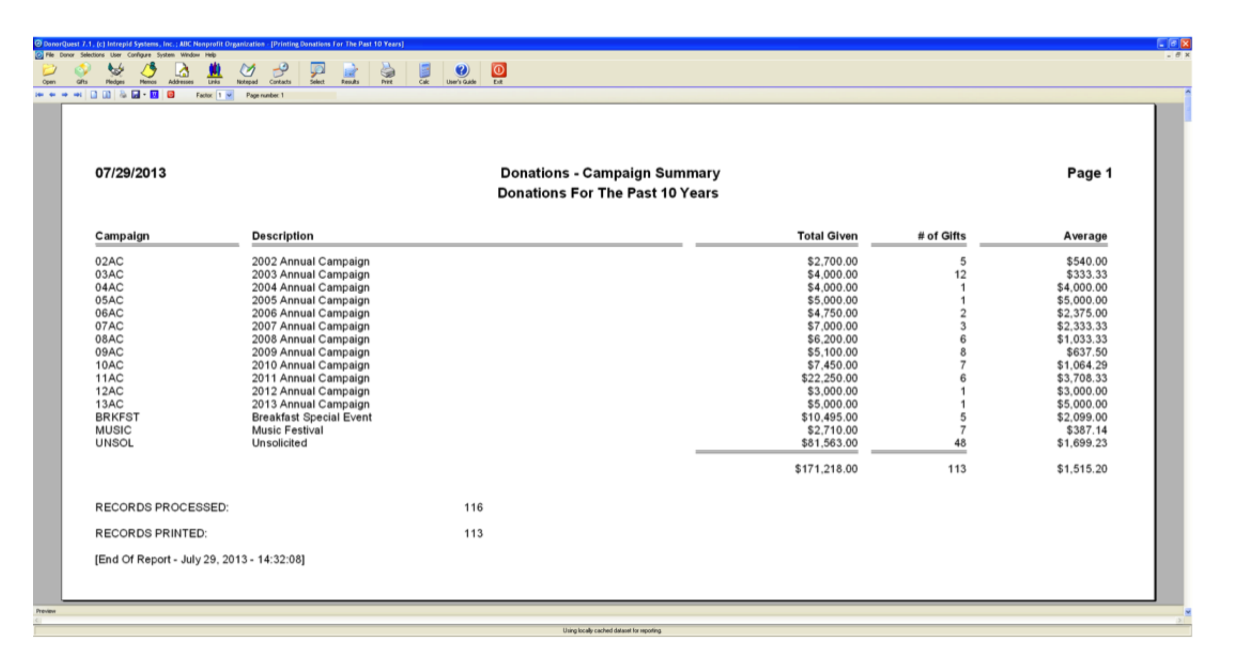
Donations - Campaign Summary				
Excluding 01AC and 00AC				
Campaign	Description	Total Given	# of Gifts	Average
====================	====================	==========	==========	=========
02AC	2002 Annual Campaign	2700	5	540
03AC	2003 Annual Campaign	4000	12	333.33
04AC	2004 Annual Campaign	4000	1	4000
05AC	2005 Annual Campaign	5000	1	5000
06AC	2006 Annual Campaign	4750	2	2375
07AC	2007 Annual Campaign	7000	3	2333.33
08AC	2008 Annual Campaign	6200	6	1033.33
09AC	2009 Annual Campaign	5100	8	637.5
10AC	2010 Annual Campaign	7450	7	1064.29
11AC	2011 Annual Campaign	22250	6	3708.33
12AC	2012 Annual Campaign	3000	1	3000
13AC	2013 Annual Campaign	5000	1	5000
BRKFST	Breakfast Special Event	10495	5	2099
MUSIC	Music Festival	2710	7	387.14
UNSOL	Unsolicited	81563	48	1699.23
		==========	==========	
		171218	113	1515.2

If the report you need to export is quite large, you may also print it directly to a standard comma or tab-delimited text file. These text formats are universally compatible with other database applications. This is done by choosing the, “Print To File” option from the DonorQuest report menu, like this:



Printing Reports Directly To Word or PDF Format

When the DonorQuest Report Preview window is active, you now have the option of printing the report directly to Word, or to a PDF file. Unlike when printing to Excel or one of the text formats, when printing to Word or a PDF file, the exact look of the report is maintained. So a DonorQuest report which looks like this in the DonorQuest Report Preview window:



07/29/2013 Donations - Campaign Summary Page 1

Donations For The Past 10 Years

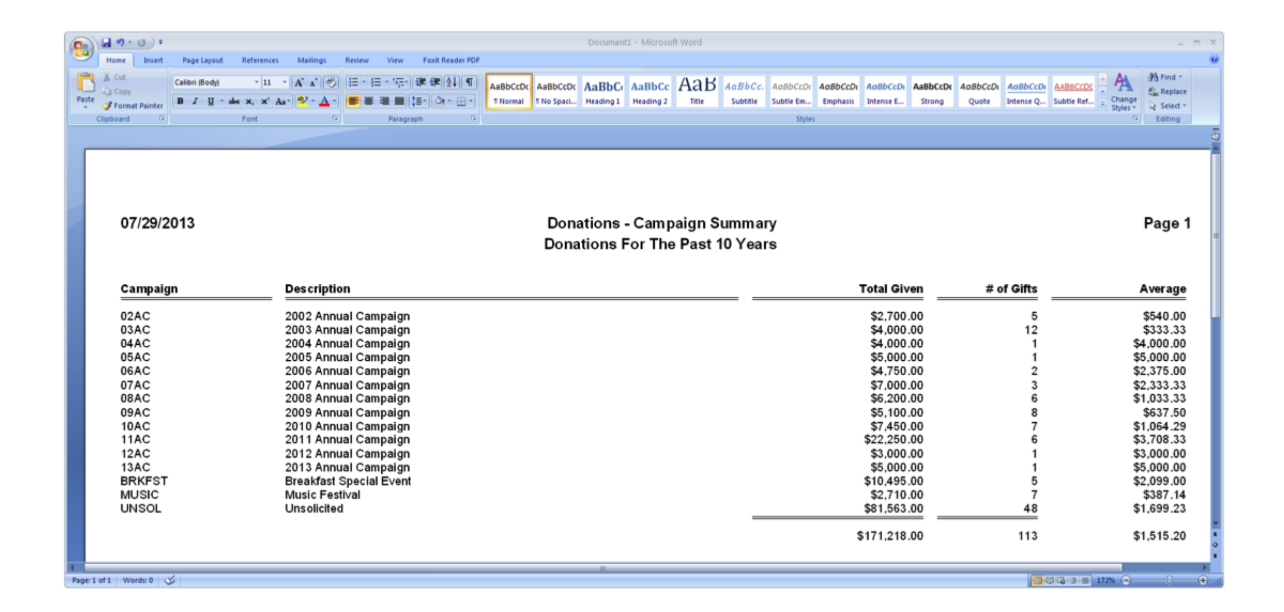
Campaign	Description	Total Given	# of Gifts	Average
02AC	2002 Annual Campaign	$2,700.00	5	$540.00
03AC	2003 Annual Campaign	$4,000.00	12	$333.33
04AC	2004 Annual Campaign	$4,000.00	1	$4,000.00
05AC	2005 Annual Campaign	$5,000.00	1	$5,000.00
06AC	2006 Annual Campaign	$4,750.00	2	$2,375.00
07AC	2007 Annual Campaign	$7,000.00	3	$2,333.33
08AC	2008 Annual Campaign	$6,200.00	6	$1,033.33
09AC	2009 Annual Campaign	$5,100.00	8	$637.50
10AC	2010 Annual Campaign	$7,450.00	7	$1,064.29
11AC	2011 Annual Campaign	$22,250.00	6	$3,708.33
12AC	2012 Annual Campaign	$3,000.00	1	$3,000.00
13AC	2013 Annual Campaign	$5,000.00	1	$5,000.00
BRKFST	Breakfast Special Event	$10,495.00	5	$2,099.00
MUSIC	Music Festival	$2,710.00	7	$387.14
UNSOL	Unsolicited	$81,563.00	48	$1,699.23
		$171,218.00	113	$1,515.20

RECORDS PROCESSED: 116

RECORDS PRINTED: 113

[End Of Report - July 29, 2013 - 14:32:08]

...will look like this in Word:



07/29/2013

Donations - Campaign Summary
Donations For The Past 10 Years

Page 1

Campaign	Description	Total Given	# of Gifts	Average
02AC	2002 Annual Campaign	$2,700.00	5	$540.00
03AC	2003 Annual Campaign	$4,000.00	12	$333.33
04AC	2004 Annual Campaign	$4,000.00	1	$4,000.00
05AC	2005 Annual Campaign	$5,000.00	1	$5,000.00
06AC	2006 Annual Campaign	$4,750.00	2	$2,375.00
07AC	2007 Annual Campaign	$7,000.00	3	$2,333.33
08AC	2008 Annual Campaign	$6,200.00	6	$1,033.33
09AC	2009 Annual Campaign	$5,100.00	8	$637.50
10AC	2010 Annual Campaign	$7,450.00	7	$1,064.29
11AC	2011 Annual Campaign	$22,250.00	6	$3,708.33
12AC	2012 Annual Campaign	$3,000.00	1	$3,000.00
13AC	2013 Annual Campaign	$5,000.00	1	$5,000.00
BRKFST	Breakfast Special Event	$10,495.00	5	$2,099.00
MUSIC	Music Festival	$2,710.00	7	$387.14
UNSOL	Unsolicited	$81,563.00	48	$1,699.23
		$171,218.00	113	$1,515.20

The Word and PDF output options of the DonorQuest Report Preview are accessed by clicking on the corresponding icons in the tool bar of the report preview window, as shown here:



Fast Printing Even On Slow Networks

DonorQuest 7.1 now uses a special caching technique when printing reports which will significantly reduce the amount of time required for printing when DonorQuest is running on a slow local area network. Basically, only recently changed report data has to be sent to each workstation for any given report, eliminating the need to routinely move large amounts of data between your organization's file server and your workstation. The performance improvement is even more dramatic if the optional DonorQuest Server Component is running on your main file server, which allows DonorQuest to operate in client/server mode.

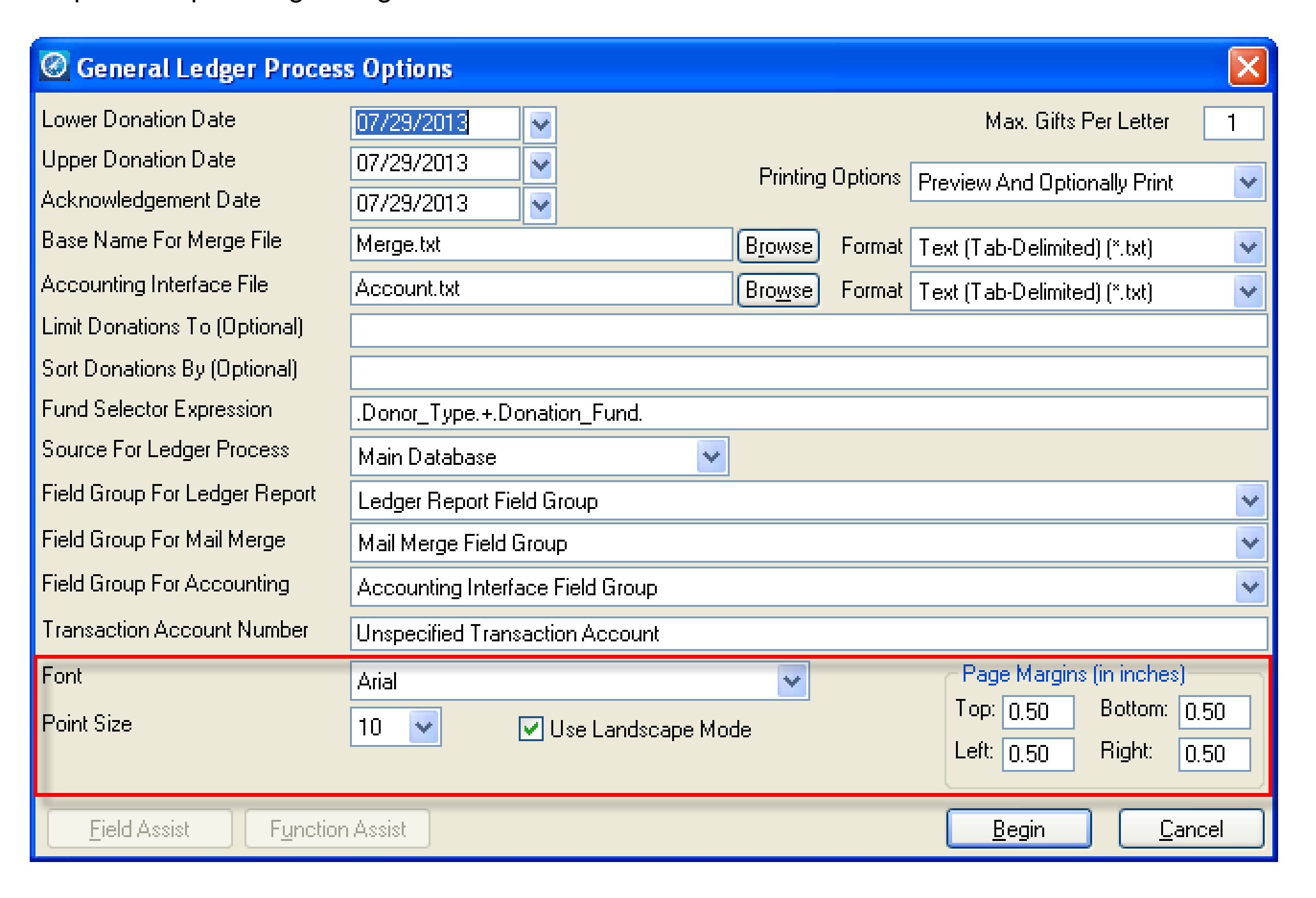
Solicitation Count Adjustment

Often times direct mail solicitations for specific campaigns are done by an outside 3rd party mailing house, sometimes combined with mailings you do in-house using donor and prospect records you already have in DonorQuest. Previously, DonorQuest would only track the rates of return for mailings done in-house using DonorQuest. DonorQuest 7.1 now allows you to make a manual adjustment to the total count of mail pieces sent for each of your appeal codes to reflect mailings done by 3rd party mailing houses. This

allows the DonorQuest campaign analysis reports to accurately reflect the combined return rate for all of your in-house and 3rd party mailing house campaigns. This new feature is accessed under the Donor, Donation/Pledge Statistics option. From there, you may adjust the number of pieces mailed for each Donation Stimulus code, and for each Donation Appeal code.

Font And Point Size Controls Added To General Ledger

The General Ledger report in DonorQuest now allows you to set the font and point size for the printed report. Page margin controls have also been added:



Enhanced Support For Non-Monetary Gifts

DonorQuest has always supported alternate unit (non-monetary) gifts such as hours of time, pounds of foods, etc. The Donation Type field has also always been used to distinguish between monetary and non-monetry gifts, and now that functionality is included with the Pledging feature of DonorQuest. This new support for alternate unit pledges also includes thorough data validation during data entry. When donations are linked to pledges as payments, a check is made to be sure the new donation is compatible with the pledge. For example, a donation of money can not be mistakenly applied to a pledge of hours.

New Reports Added

The following new DonorQuest reports have been added to the Pre-Defined tab of the DonorQuest Reports menu:

Contacts - By Year And Month, Subgrouped By Action
Donations - Amount And Count By State With Percentage
Donations - Comparison of Giving for each Stimulus and Donor for 5 Calendar Years - Summary
Donations - Comparison of Giving for each Stimulus and Donor for 5 Fiscal Years - Summary
Donations - Donation Detail Report With Addresses Including Alternate Unit Donations
Donations - Donation Detail Report With Addresses Including Alternate Unit Donations - Totals Only
Donations - Grouped By Appeal - Summary - Current And Past 2 Fiscal Years Only
Donations - Grouped By Donor And Fund - Summary
Donations - Grouped By Donor Name With Calendar Year Totals And Counts
Donations - Grouped By Donor Name With Fiscal Year Totals And Counts
Donations - Grouped By Donor Type With Calendar Year Totals And Counts
Donations - Grouped By Donor Type With Fiscal Year Totals And Counts
Donations - Grouped By Fiscal Year + Appeal - Summary
Donations - Grouped By Fiscal Year - Alternate Unit Donations - Summary
Donations - Grouped By Giver, Showing Soft Credit Recipient (If Any)
Donations - Quarterly Giving Totals By Calendar Year
Donations - Quarterly Giving Totals By Fiscal Year
Donations - Soft Credit Donations Only, Grouped By Soft Credit Recipient, Totals Only
Donations - Volunteer Hours For Soft Credit Recipient, Totals Only
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard & Soft Totals, No HONOR/MEMOR
Header - 3-Year Comparison Of Year-To-Year Calendar Year Giving, Hard And Soft Totals
Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard & Soft Totals, No HONOR/MEMOR
Header - 3-Year Comparison Of Year-To-Year Fiscal Year Giving, Hard And Soft Totals
Header - Birthdays By Month
Header - Comparison Of Month-To-Month Giving, Calendar Year 1 Year Ago
Header - Comparison Of Month-To-Month Giving, Calendar Year 2 Years Ago
Header - Comparison Of Month-To-Month Giving, Calendar Year 3 Years Ago
Header - Comparison Of Month-To-Month Giving, Current Calendar Year
Header - Comparison Of Month-To-Month Giving, Current Fiscal Year
Header - Comparison Of Month-To-Month Giving, Fiscal Year 1 Year Ago
Header - Comparison Of Month-To-Month Giving, Fiscal Year 2 Years Ago
Header - Comparison Of Month-To-Month Giving, Fiscal Year 3 Years Ago
Header - Comparison Of Month-To-Month Giving, Previous Fiscal Year
Header - Comparison Of Year-To-Year Giving By Calendar Year, Volunteer Hours Only
Header - Count Of States With Percentages
Header - Donation History Report, Hard And Soft Credit Donations For Specific Date Range
Header - Donor Name And Address And Total HR Giving, Counts, Average

Header - Donor Report (Ranked) w/ Contact Info & Donation Total For A Specific Stimulus
Header - Top 300 Donor Report For Past 60 Months

Updated Internal Zip Code Table

As with all updates, this release of DonorQuest also has an updated internal zip code table which contains all the City, State, Counties, and 5-digit zip code combinations in the United States. This is used to support the auto-entry of city, state, and county for you when adding a new donor. Remember, to use this feature, all you have to do is enter the zip code for a new donor and press the Tab key. Leave the city, state, and county fields blank, as they will be filled in for you automatically when you Tab out of the zip code field. This updated internal table also supports the System, Auto-Fill Empty Salutation And County Fields option. This feature searches your entire database, automatically filling in any missing Salutation and County fields.

October, 2013

18.10 What Was New In DonorQuest 7

DonorQuest 7 is not just an upgrade, it's a complete rewrite of DonorQuest. All of the internal program code is completely new. Selection (query) processing has been dramatically improved both in terms of the raw performance available due to the new client/server technology in DonorQuest 7, and also due to a redesigned selection interface. Direct communication with other applications is also now supported, allowing DonorQuest to directly performs actions such as create and populate an Excel spreadsheet without a file export/import process.

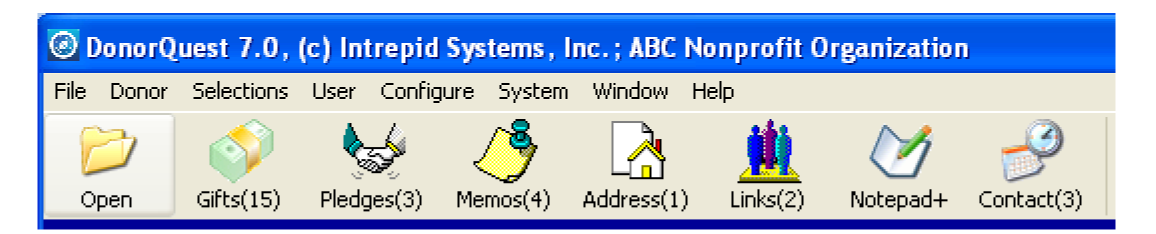
While DonorQuest 7 is completely new, we have taken care not to change the data entry forms and fields which have worked so well for so many years, and which our users have grown so used to. We have also kept the menu and tool bar options much the same, so you will not have to go looking for things moved for no good reason. In computer software, change for the sake of change is never a good thing, especially if the change has a negative impact on efficiency. So we took care not to “fix” what was never broken in the first place. The Selection interface is different than in previous versions, but the changes were made to enable two very important new selection features in DonorQuest 7 – the ability to run more than one type of selection at the same time, and the ability to change the conditions of an existing selection. In previous versions of DonorQuest, if you made a mistake in one of the conditions for a selection, you would have to start over again with a new selection.

If you are coming from a version of DonorQuest earlier than 6.9.2.2, you should also consult the various "What's New..." documents, available on the DonorQuest website at: www.donorquest.com. From the home page, click on Support, then click Downloads. The version of DonorQuest you are currently running is always shown in the upper-left corner of the main DonorQuest window.

Some of the new features of DonorQuest 7 include:

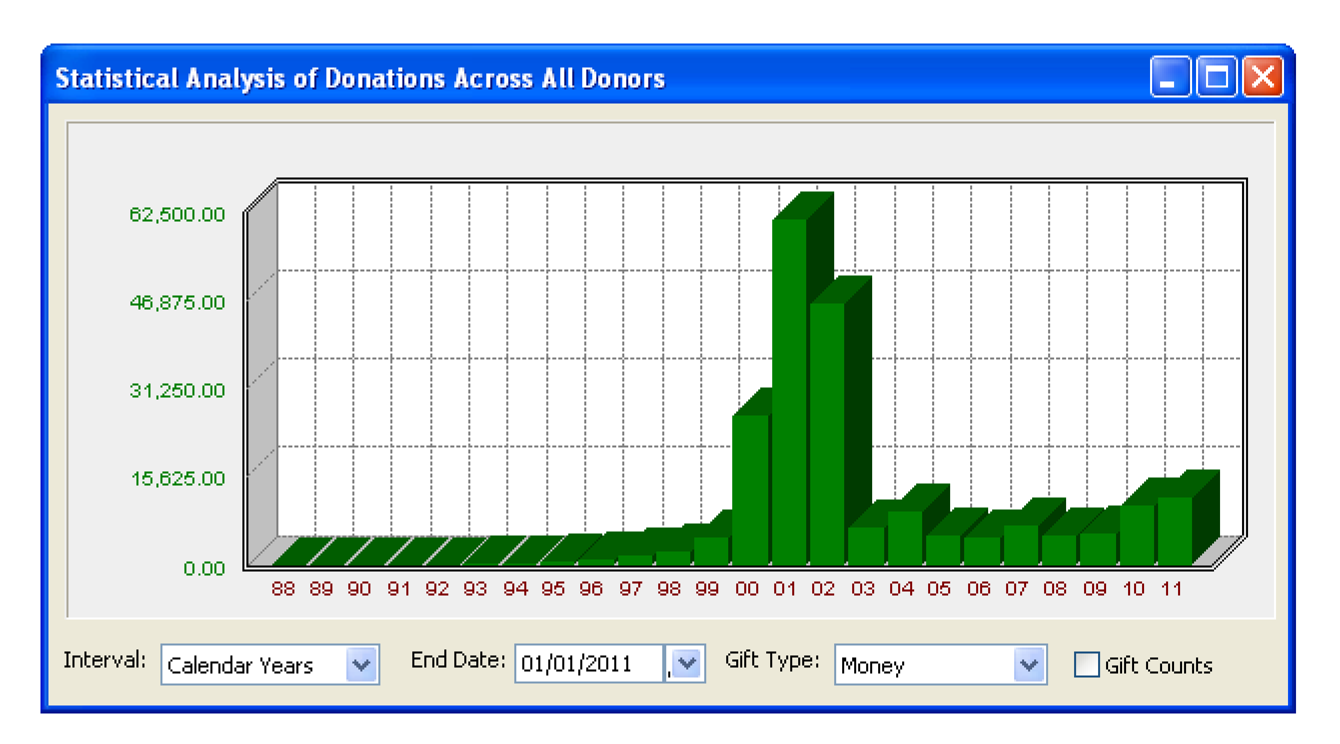
Tool-Bar Enhancement

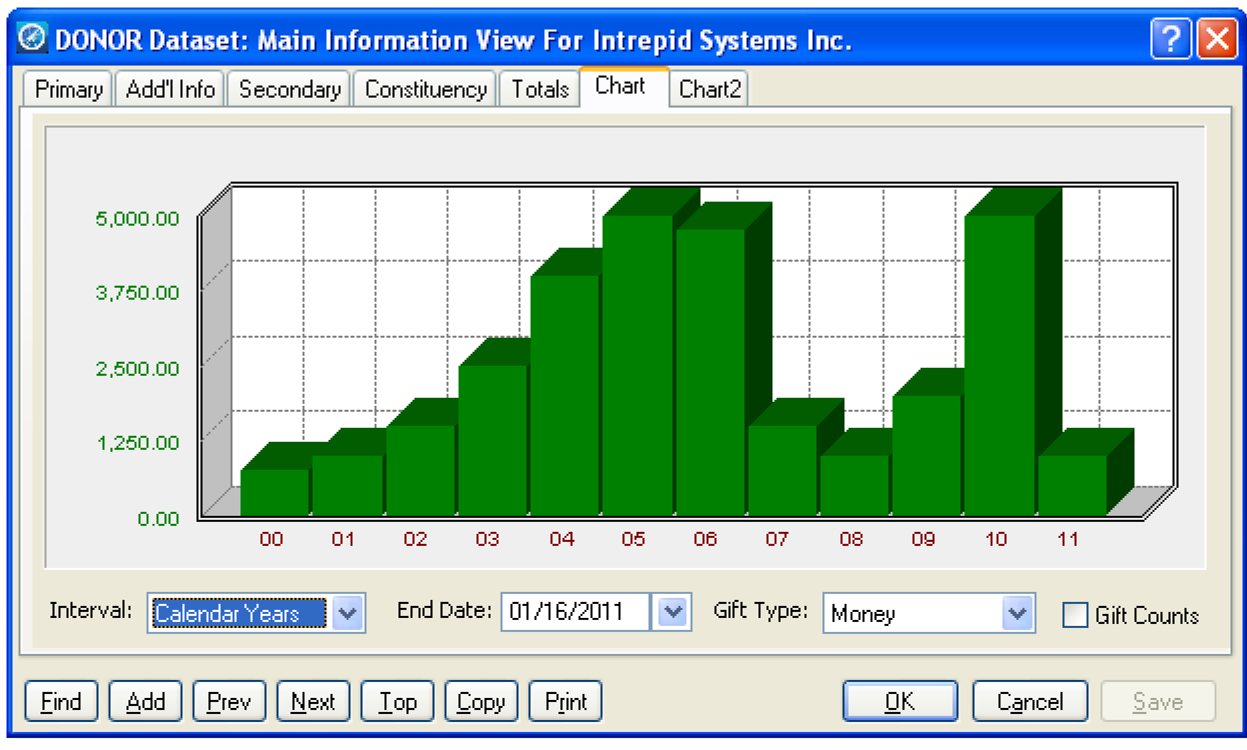
The icons on the DonorQuest tool bar look a bit nicer, and still activate the same features as previous versions of DonorQuest. In previous versions of DonorQuest, an amber-colored indicator would show above each tool bar button to indicate when there is data behind it. DonorQuest 7 improves on this by actually showing a count of how many data items are behind a given button. For example, if a donor has 15 donations, 3 pledges, 4 memos, one extra address, 2 linkages, a NotePad entry, and 3 contacts, the left portion of the toolbar would look like this:



New Organization-Wide and Donor-Specific Donation Graphs

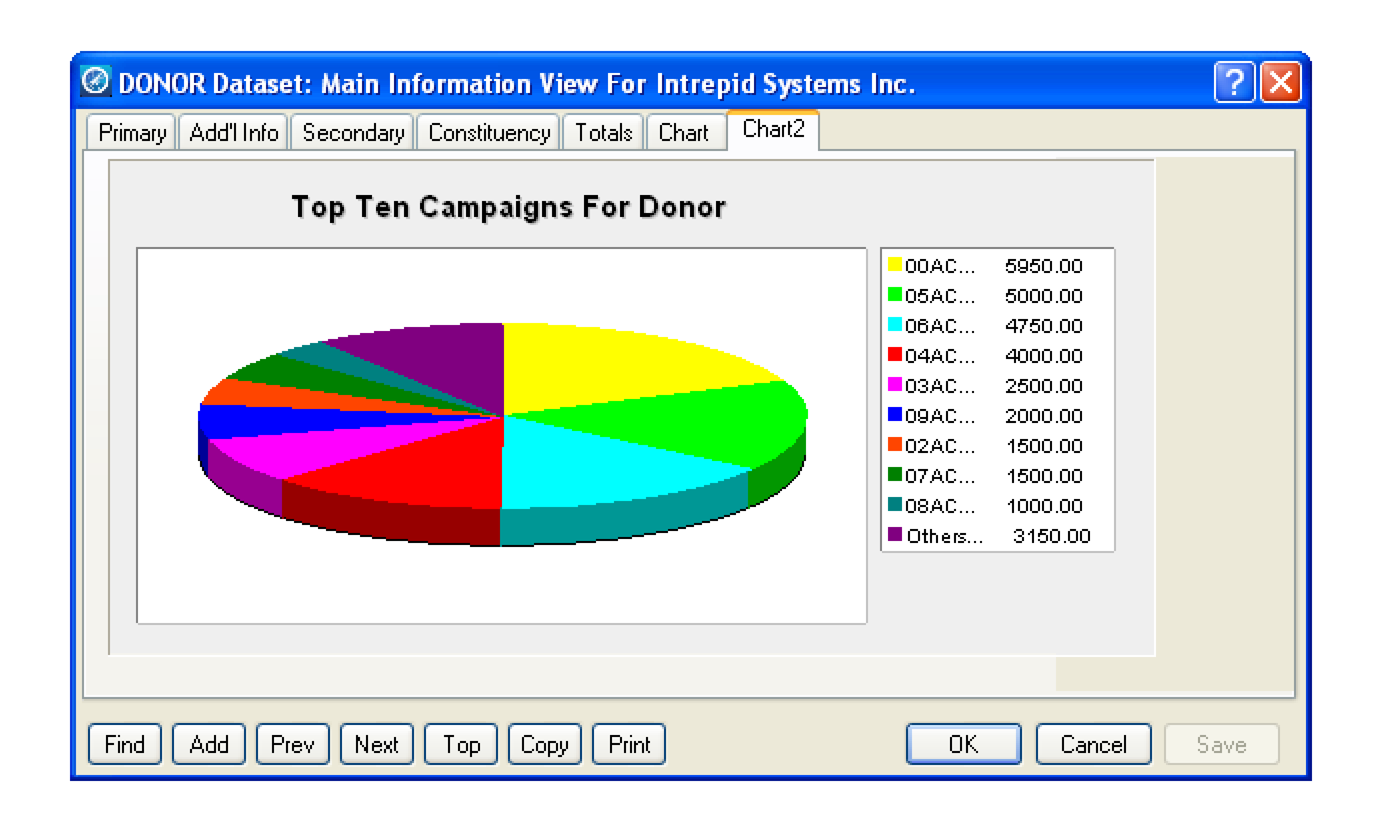
DonorQuest 7 now makes it easier to get the big picture of how your organization has been doing over the years. You can see a graph of total revenue (or gift count) for any ten year period by calendar or fiscal year. You can also see total revenue (or gift count) by month for any 24-month period, or total revenue (or gift count) by week for 24 weeks. In addition, graphs for non-monetary types of donations (such as volunteer hours) can be shown. All of these graphs are also available at the donor-specific level. Here are examples of the standard calendar year monetary graphs at the organization and donor-specific levels:





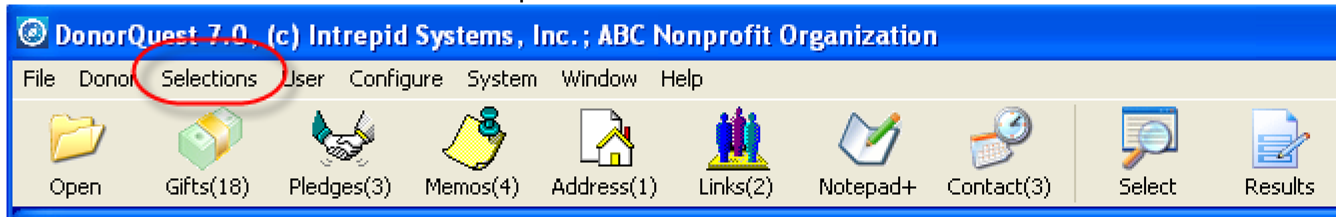
Top Ten Campaign Pie Chart

The standard top ten campaign pie chart has been visually enhanced, and now looks like this:



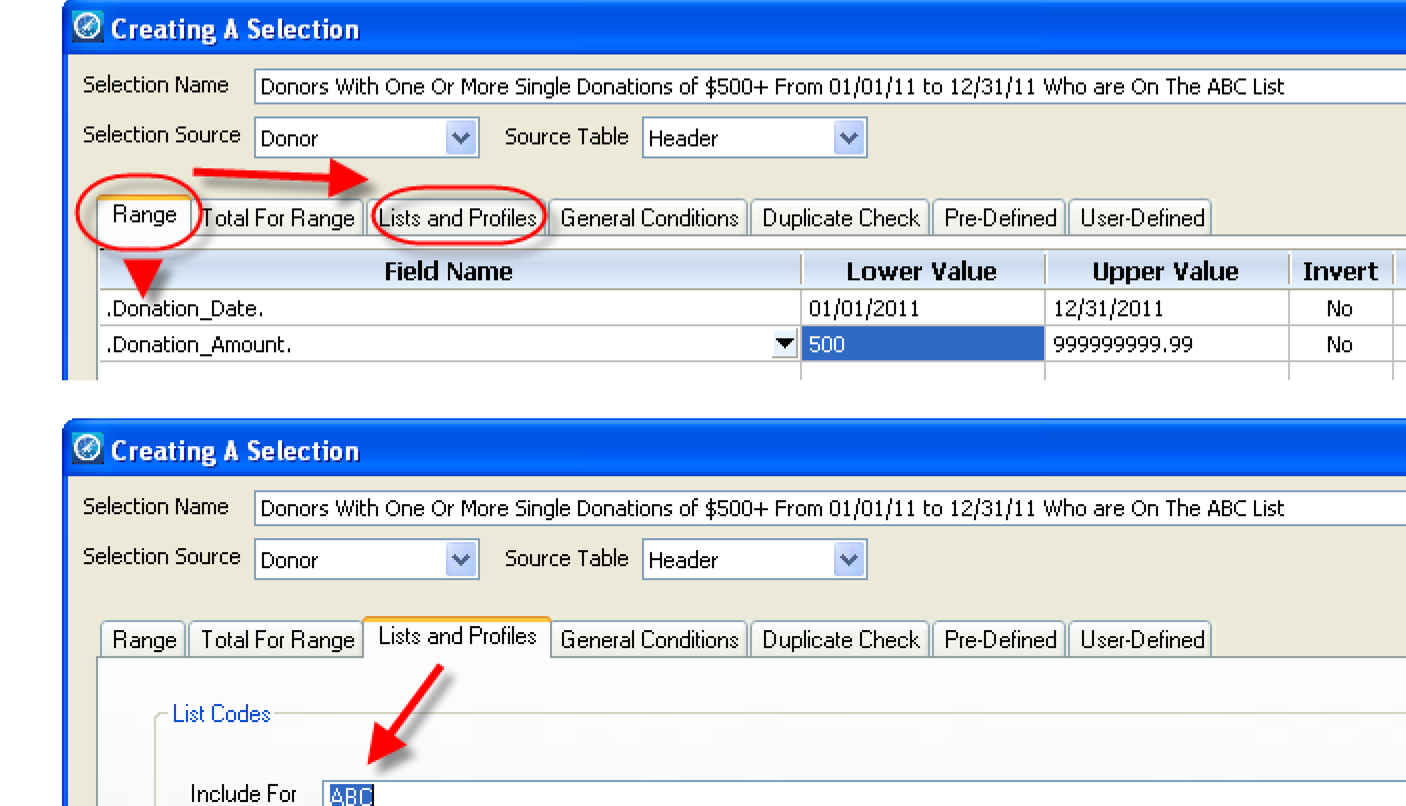
New Selections Menu Option

A new Selections menu has been added to the main DonorQuest menu. This menu replaces the small File, Edit, View menu shown in the Selection Results window in previous versions of DonorQuest. Most of the options on this menu become available only when the Selection Results window is open. The new Selections menu is shown here:



New Tab-Based Selection Interface

In previous versions of DonorQuest, you could only run one type of selection at a time. DonorQuest 7 allows you to use every type of selection DonorQuest has to offer in a single pass. For example, you can now run a basic Range Selection and a List Code selection at the same time. The example shown below will select all donors with one or more single gifts of $500 or more from 01/01/11 to 12/31/11:, who are also on the ABC list:



In the above example, clicking on the Lists and Profiles tab allows entry of one or more list codes. You may in fact enter additional conditions under any of the tabs.

General Conditions Selection

The General Conditions tab of the Creating A Selection dialog offers a new type of selection which is similar to the Range Selection, but instead of value ranges, this selection type allows the following comparisons with fields: Is Equal To, Is Not Equal To, Is Greater Than, Is Less Than, Begins With, Does Not Begin With, Contains, Does Not Contain.

Enhanced Duplicate Check Selection

The Duplicate Check type of selection now allows you to select from among all available biographical fields when deciding which fields are to be used for comparison in detecting potential duplicate records, including any user-defined fields you may have created. As with earlier versions of DonorQuest you may also specify how many characters, from left-to-right, are to be considered for each field used in the check.

Enhanced Total Amount For Date Range Selection

The Total Amount For Date Range selection now allows you to ask questions based on

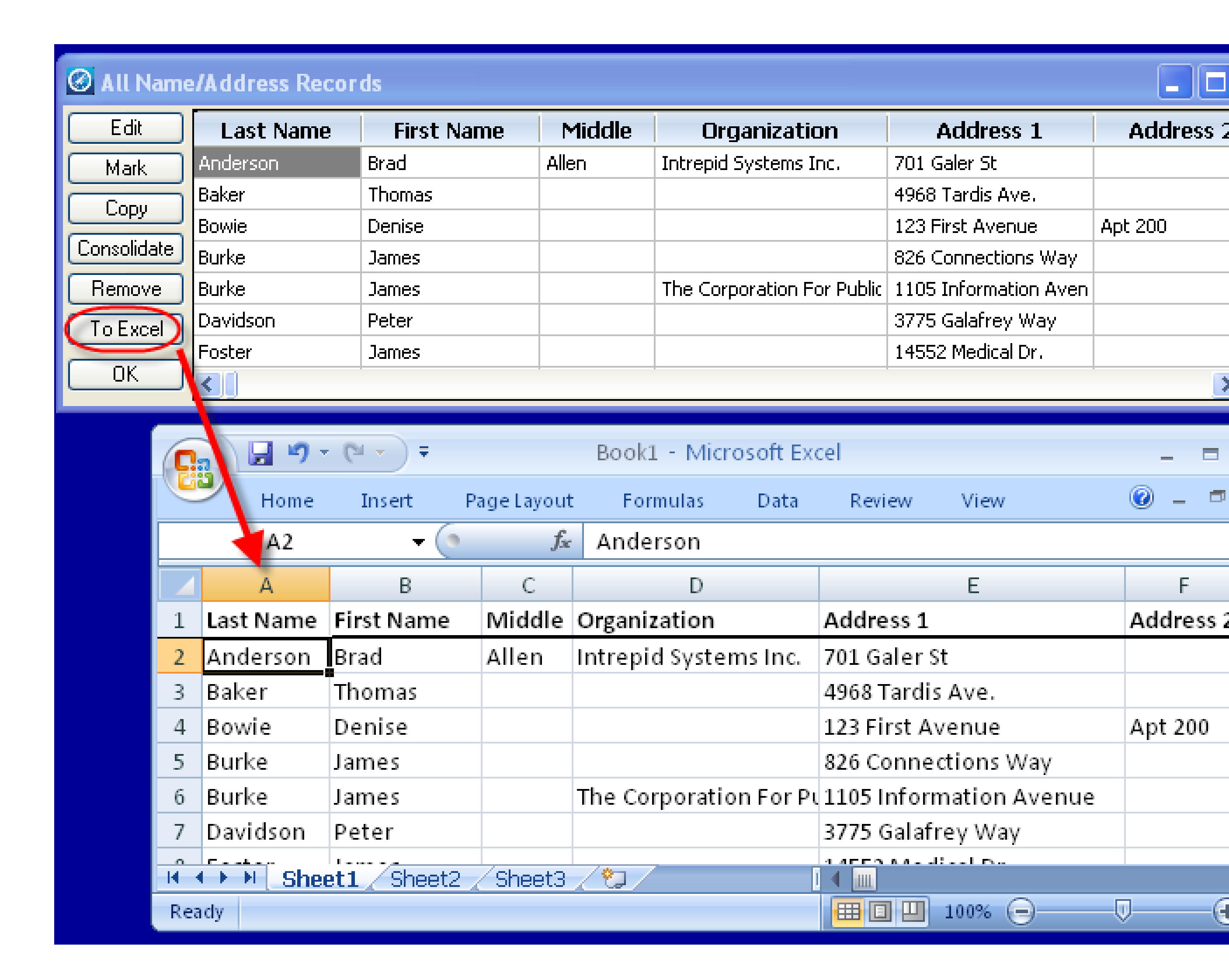
how many gifts a donor gives in a certain period of time, not just the amount totals. Previously this would have required a custom selection.

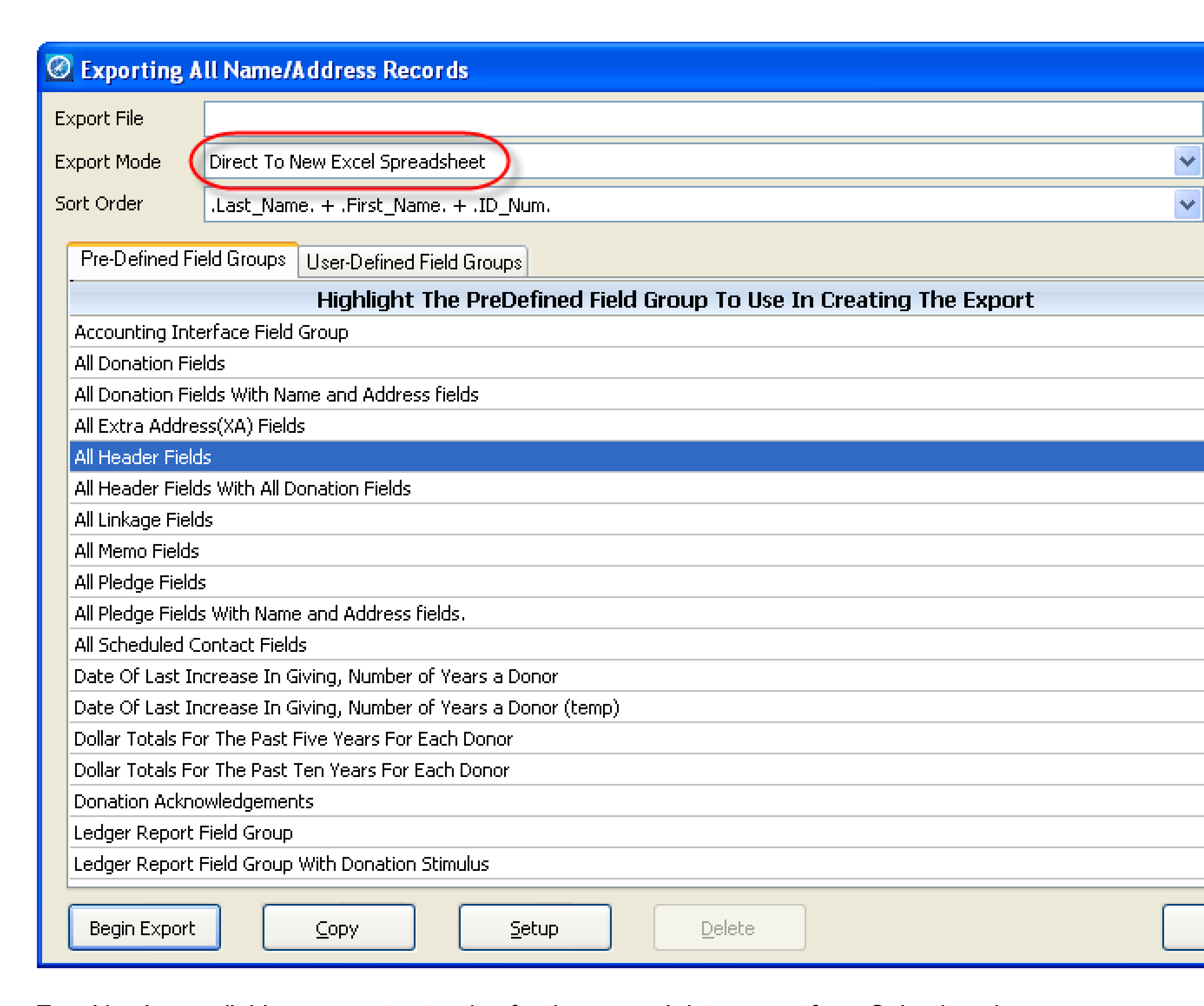
ReSelect and ReSelect New

In the Selection Results Window, we now have two new buttons, ReSelect and ReSelect New. The ReSelect button lets you make changes to the conditions of an existing selection, so if you made a mistake in entering the conditions of a multi-condition selection, you don't have to start over. You can correct the conditions and the selection will rebuild itself. The ReSelect New option allows you to take the conditions of an existing result and use them as a starting point for a completely new selection, keeping the original just as it is. These new options are also available on the new Selections menu.

New "To Excel" Feature

When viewing a selection result in DonorQuest 7, you will notice a new To Excel button. Clicking on this button will open Microsoft Excel automatically, create a new spreadsheet, then populate that spreadsheet with the contents of the selection result you are viewing. Here's what is looks like in action:

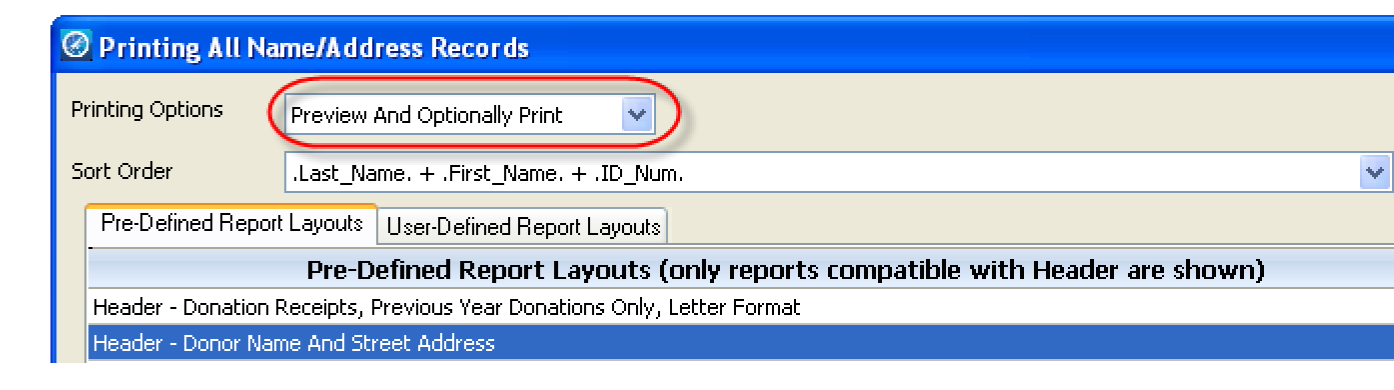

All Name/Address Records
Edit
Mark
Copy
Consolidate
Remove
To Excel
OK
Last Name
First Name
Middle
Organization
Address 1
Anderson
Brad
Allen
Intrepid Systems Inc.
701 Galer St
Baker
Thomas
4968 Tardis Ave.
Bowie
Denise
123 First Avenue
Apt 200
Burke
James
826 Connections Way
Burke
James
The Corporation For Public
1105 Information Aven
Davidson
Peter
3775 Galafrey Way
Foster
James
14552 Medical Dr.
Book1 - Microsoft Excel
Home
Insert
Page Layout
Formulas
Data
Review
View
A2
Anderson
Sheet1
Sheet2
Sheet3
Ready
100%



Excel is also available as an output option for the general data export from Selections in DonorQuest 7. Since the general data export can be used with any field group defined in DonorQuest (including any custom field group you have created), you can effectively export directly to a new Excel spreadsheet any combination of data fields you wish (including custom fields and formulas), in any column and alphabetical order you wish. To use this new feature, choose Direct To New Excel Spreadsheet as the Export Mode when exporting a selection result, as shown here:

Enhanced Report Preview

DonorQuest 7 now has a report preview which will allow you to preview multiple reports simultaneously, zoom the preview, have opposing pages shown together, etc. To see a report preview before printing, choose Preview And Optionally Print for the Printing Options of the main print dialog, as shown here:

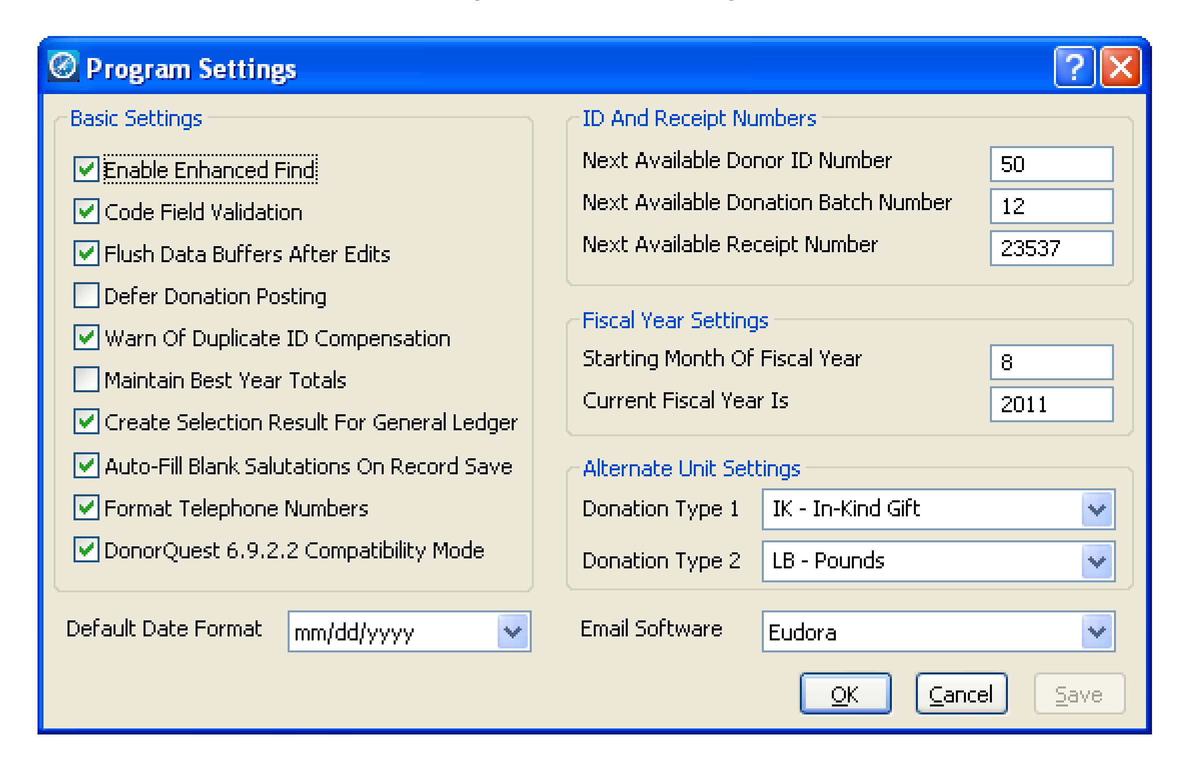


Client/Server Technology

By enabling the optional server component, DonorQuest 7 will now run selections and other data-intensive operations directly on the file server, allowing selections which used to take minutes to run in a few seconds. This enhancement is especially import for organizations with large databases. And it is included free with DonorQuest 7, you just have to ask your system administrator to enable it for you. If you are running DonorQuest 7 you can verify the client/server mode is enabled by clicking on System, DonorQuest Server Status.

New Program Settings Dialog

The new program settings dialog consolidates what were four separate dialogs in previous versions of DonorQuest into a single convenient dialog which looks like this:



Open Multiple Instances On A Single Workstation

DonorQuest 7 will allow you to open it more than once on a single workstation. So you could, for example, be editing a selection result, setting up a report, doing a data export, etc., in one instance of DonorQuest 7, while you have another instance running with the Main Information Window open and at the ready for a quick donor look-up.

June, 2011

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- < -

<CharacterField> 772, 773, 774, 776, 785, 792, 801, 819, 872, 873
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